

Annual Childcare Sufficiency Report

March 2022



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Executive summary

Key points

This report fulfils a statutory duty to report on the sufficiency of childcare in Birmingham in 2021. It is based on analysis of data from Birmingham City Council and others, and surveys, interviews and discussions with parents and providers.

- An estimated 23,000 Birmingham children (of 79,000 under-fives and falling) were eligible for Early Education Entitlements in Autumn 2021.
- Around half of parents surveyed wanted to use more childcare; 22% found it difficult to find childcare, and 54% did not require any further support. 34% needed information about free offers to help them access childcare.
- As of August 2021, 204 Birmingham schools provide free places, and there are 869 private, voluntary, independent and maintained providers, most of which offer EEEs.
- At the same point in time, provider numbers have fallen but places are more stable, up 2% since 2019 to 24,247. Vacancies for EEE places increased 26% from 2019 to 2021.
- Half of childminders responding to our survey were confident they would still be operating the following term, with reduced demand cited most often.
- Most parents surveyed (58%) considered their childcare extremely suitable, especially formal childcare, with quality the key criteria when choosing.
- Average prices rose by 6% for hourly and 8% for weekly rates between 2019 and 2021. Childminders' weekly fees rose furthest, up 13%. Parents surveyed said their childcare was somewhat or very unaffordable (35%) or somewhat affordable (45%).
- There has been overall stability in the percentage of eligible children accessing EEE from Autumn 2019 to Autumn 2021, but with a small rise in 2 year old take up from 65% to 66%. Take up of 3 year old places has remained the same at 89%. In our survey 54% to 64% of parents were aware of the EEEs, with fewer aware (12% to 42%) of other childcare help.
- The small sample of parents we spoke to who did not take up EEEs (21) cited a wide range of reasons, including a lack of awareness and availability of EEE places, concerns about the quality of provision, and children's readiness for childcare.
- As of Spring 2022, for under 5s, there is an oversupply of 19,774 places.

Background

Childcare underpins and supports a wide number of national and local strategies such as child poverty, social mobility and narrowing the attainment gap. This report, by Coram Family and Childcare for Birmingham City Council, considers the sufficiency of childcare in Birmingham in 2021, and so fulfils the city council's statutory reporting duty under the Childcare Act 2006. It covers current and projected need and demand for and supply of childcare of different types and sectors, including free provision, and considers the latest evidence from a range of sources on affordability, accessibility and quality.

Where possible we have a particular focus on Special Educational Needs and Disabilities (SEND) children and ethnically diverse families. The local authority have decided to use

the term 'Ethnically Diverse' in this report where appropriate rather than 'BAME' as this is an increasingly contested term.

The Local Authority have plans to consult with relevant groups and stakeholders to find a more suitable alternative.

In the main this report presents data from summer term 2021, which was the latest available data at the time of analysis. However, towards the end of the project we decided to update data related to take up of early education entitlements, to data from Autumn term 2021, due to the variations in this data from term to term. Also at the end of the project we produced a suite of appendices which is a ward level analysis of 0-5s demographics, provider level information, take up of EEE, vacancies and sufficiency. This is an addition to the report, and is based on more recent data from Autumn 2021. Where there is crossover of data in the report to an appendix (mainly in relation to take-up of EEE) this is noted in the text. This year for the first time we also carried out new data gathering: we surveyed 395 parents and carers looking after 472 children receiving childcare. We interviewed 18 parents and carers, and 6 of their 42 children, as well as 10 providers, 5 employers, ran a focus group with 8 young people with SEND. We spoke to a further 27 people to understand reasons for non-take up of entitlements, especially among ethnically diverse families (18 parents, six staff members, and three childminders at 'stay and play' groups), to add depth to our findings.

Need and demand

Birmingham's 79,000 children aged under-5 are shrinking in number in all districts, down 6% on 2019. An estimated 23,000 were eligible for Early Education Entitlements in Autumn 2021.

The under-fives population (May 2021) is 67% Black, Asian, Mixed or Other, and around four in ten nursery school pupils have English as an additional language.

The proportion of children with SEND who accessed Early Education Entitlements has seen a small rise since 2019 (5% of children accessing the 2 year old offer and 6% for the 3-4 year old offer). 3% of pupils in all Birmingham's schools and nurseries had Education Health and Care (EHC) plans or statements of SEN, and 14% had SEN support. Thirty percent of the providers in our survey provided childcare to at least one child with a diagnosed SEND. In our survey of parents, thirty percent of the sample were ethnically diverse and 9% (29 respondents) had one or more children with SEND (so findings on the small group should be viewed with caution).

One third of Birmingham's pupils are eligible for free school meals. Birmingham has a higher proportion of children living in workless households or on low incomes than England as a whole.

Use of childcare

Over half of parents surveyed in November/December 2021 (57%) used more than one type of formal childcare, most often nurseries (41%), after school clubs (29%), nursery school or school-based nursery (26%) and breakfast club (24%). Informal childcare was used by 29% of survey respondents. 32% of white respondents and 23% of ethnically diverse respondents used informal childcare. 43% of parents of SEND children and 28% of other parents used informal childcare. Parents most often said they used childcare so they could go to work (77%); this was 78% for ethnically diverse respondents, but 59% for

respondents with at least one SEND child. Other reasons were selected by less than half of parents.

51% of parents wanted to use more childcare. For parents of at least one SEND child, this was 57%. For ethnically diverse parents, it was 58%. For 81% of those not using as much childcare as they would like, the reason for this was that it was too expensive.

The majority (77%) found it very or fairly easy to find childcare, while 22% found it fairly or very difficult. Parents from ethnically diverse backgrounds and those with a child with SEND were a little more likely to experience difficulty in finding childcare. Most often, parents found out about childcare through word of mouth (62%), while about half used internet searching.

The most common type of support parents felt they needed to access childcare was information about types of free formal childcare (34%), though more than half (54%) reported that they did not require any further support.

Childcare providers

Overall, there are 869 formal childcare providers in Birmingham across the private, voluntary and independent (PVI) and maintained sectors as of August 2021. There are also 204 schools providing Early Education Entitlements (EEE) places. Whilst the data on PVI and school places for children under 5 is reasonably complete, data on the number of out of school clubs and holiday play schemes is not as reliable, as not all out of school childcare has to be registered with Ofsted.

Approximately in line with national trends, the number of PVI childcare providers has fallen by 5% since 2019, to 869. More than half of these 869 (475) are childminders. Pre-school playgroups and nursery units of independent schools have increased in number, but 49 childminders and 8 day nurseries have ceased to operate since 2019. Among the 869 PVI providers, most (692) offer EEE, down 2% overall on 2019. In our survey, three quarters of all providers offered all of the EEEs and expectations were high that the EEEs would continue to be offered in future.

Different provider types are not evenly spread across districts – for example, Erdington lacks any pre-school playgroups offering EEE, and had the biggest fall in all PVI providers offering EEE between 2019 and 2021 (-12%), having already had the smallest number of any district in 2019. In August 2021, 204 schools were providing EEE places, down 3 of 2019.

Childcare places

Places for children in PVI early education and childcare have been more stable with a 2% increase since 2019 to 24,247 (of which 22,427 were in EEE registered PVI settings) at August 2021. This overall small increase conceals larger rises and falls, with places in nursery units of independent schools up 29% to 707, childminder places down 9% to 3,084, and places in pre-school playgroups up 28% to 1,715. The number of full-time places in schools providing EEE in Birmingham is 9,178 (18,356 part-time places). Our Autumn term 2021 survey found that, on the whole, fewer places were currently filled compared to Autumn term 2019. Parent fees made up a lower proportion of total income in 2021 for 54% of relevant respondents.

Vacancies for EEE places have increased markedly since 2019, 26% overall, indicating an over-supply of childcare places. While this may have implications for the financial

sustainability of providers, it indicates that there are generally enough places for working parents and carers in aggregate. Local and family specific factors mean some families nonetheless struggle to find appropriate childcare. Parents we interviewed described challenges in finding childcare to meet the needs of their family, such as availability at the hours they required, or places at settings near the schools of their older children. In our survey of providers slightly more respondents foresaw an increase in demand for EEE places (29%) than expected no change (28%). The most common answer in respect of fee-paying places was no change (33%). Covid-19 was cited both as a reason for uncertainty and for predicted rises and for falls, in that parents might seek a new work-life balance, or return to the office following periods of lockdown. Asked in November/December 2021 about their expected level of occupancy from January 2022, the largest number of providers (41%) expected at least 80% occupancy; 90% at least 40%; and 3% (n=4) expected only up to 40% occupancy this year.

Vacancies

Vacancies increased across placement types and ages, with only holiday vacancies for 4 to 11 year olds seeing a fall. Vacancy levels for holiday play schemes provided by the PVI sector are generally low at 2,087. However, the vacancy rates are varied across the city, with six wards having 100 vacancies or more, and 26 wards without vacancies. In our survey, most providers (73%) had at least one vacancy, over 15 vacancies per provider on average. The largest number of providers said this number was typical, rather than higher or lower than pre-Covid. Vacancies was most stable in schools, with the greater change (higher and lower) in the private sector.

Most often, providers we surveyed had not made any Covid-related operational or staffing changes since September 2021, so the overall picture was one of continuity, rather than change. Where changes were made, the most common were reduced opening hours, reduced staff hours, and redeploying staff from other areas of the business.

We asked in November/December 2021 about confidence that the setting would still be operating in Spring 2022. Only half of childminders responding were confident or very confident, and around two thirds of private and independent sector providers. 'Reduced demand for fee-paying places' was the most often selected reason for those who were not confident.

Suitability of childcare

Asked about the suitability of their current childcare, 58% of parents in our survey answered that it was extremely suitable, with similar answers from ethnically diverse parents and parents of SEND children. Formal provision (nurseries and childminders) were considered more suitable (62% to 78% 'extremely suitable') than informal childcare (39%). In order from most to least, respondents rated the following factors important when choosing childcare: quality of care (average score 4.96 out of 5); reputation (4.80); facilities (4.63); other (4.29); cost (4.27); proximity to home (4.23); in-person open days (4.11); proximity to place of study or workplace (3.09).

Quality of childcare

Our parent survey shows that 97% of respondents cite quality as an important factor influencing choice of childcare. But Birmingham's childcare is slightly less high in quality than the national and regional averages, in terms of the percent of providers with good or outstanding Ofsted ratings. The Birmingham average was 93% in 2021, ranging by district from 78% in Hodge Hill to 98% in Sutton Coldfield and Selly Oak. However, 100% of

nursery schools are good or outstanding, and 93% of day nurseries. Where no children were on roll or present at the time of inspection (solely childminders), 82% met the overall quality and standards for early years provision, a 7% point increase from 2019.

Affordability

The average prices charged for childcare in Birmingham have risen since 2019, by 6% for hourly and 8% for weekly rates. Childminders' weekly fees have risen furthest, up 13% to £191.33 on average. Hourly rates for pre-school playgroups are also up 10% to £4.66. Average prices varied by district, from £4.80 (Selly Oak) to £6.79 (Ladywood) for hourly childcare, to weekly rates of £176.06 in Hodge Hill to £246.40 in Edgbaston.

In our survey of parents, most often childcare was considered only 'somewhat affordable' (45%) with 21% finding it very affordable, and the remaining 35% of parents finding it somewhat or very unaffordable. Interviews with parents suggested that childcare costs limited some parents' ability to work.

Early Education Entitlements

While, on the whole, most districts have seen a slight fall in the number of PVI providers registered for EEE, such places in the PVI sector have increased by 4%. Increases are highest in NUIS (+38%) and there has also been a rise in day nursery places (+6%). However, childminder (-5%) and preschool play group (-14%) places have decreased. There has been overall stability in the percentage of eligible children accessing EEE from Autumn 2019 to Autumn 2021, but with a small rise in 2 year old take up from 65% to 66%. There has been a small increase in the proportion of children accessing the 2 year old offer who have SEND from 4 to 5%. Six percent of children who access the 3-4 year old offer have SEND and this has been stable since 2019. There was also a slightly smaller proportion of 3- and 4-year-olds that transitioned from the 2-year-old funding to extended entitlement in 2021 compared to 2019.

Majorities of 54% to 64% of parents surveyed were aware of the EEEs, and minorities of 42% to 12% aware of other types of help such as tax free childcare and tax credits for childcare. Compared to other parents, parents of SEND children were generally less aware. Over a third of all respondents (36%) did not know whether they were eligible for tax free childcare, employer childcare vouchers and tax credits for childcare.

Satisfaction with EEEs was high. Positively, the vast majority of parents using free entitlements (83%-86%) were completely satisfied or satisfied with session times, locations and choice of providers. Asked about their childcare in general, 91% were happy or very happy. Parents of SEND children and ethnically diverse parents responded in broadly the same way as other parents, though were more likely to be 'happy' rather than 'very happy'.

There were a variety of reasons the parents we spoke to did not take up EEE - a lack of awareness, particularly among those with English as an additional language, difficulty finding suitable places, additional charges from settings, concerns about child readiness and SEND, a lack of trust, perceived advantages of not using formal childcare, and confusion about the process or criteria.

Sufficiency

In terms of numbers, the overwhelming demand for Early Education and Childcare places is required for the 0 to 4 age range. Demand for places is based on parental requirements

such as childcare for when they are at work or study and take up of early education entitlements.

As of the latest Sufficiency Assessment Spring 2022 for under 5s, there is a general oversupply of 19,774 part-time places, with a surplus of 2,014 places for 2 year olds specifically. Although there is a general oversupply of places citywide, there are several wards in the city that have a deficit of places. These should be monitored going forwards as there will be implications if demand for places increases or there are reductions in supply of places.

Migration between wards for childcare may play a role in our analysis of sufficiency. In the Autumn term of 2021, just over half (58%) of children in Birmingham accessing EEE childcare places through PVI providers and schools resided in the same ward as their childcare provider, meaning that 42% of children lived in a different ward to their provider.

Introduction

English local authorities have a duty under Section 6 of the Childcare Act 2006 to secure sufficient childcare for working parents. Local authorities are also required to make available sufficient free early education places for every eligible 2, 3 and 4 year old child in their area.

The statutory requirement intends to ensure that parents are able to work because childcare places are available, accessible, affordable, and are delivered flexibly in a range of high quality settings.

To secure sufficient childcare places, the council is required by legislation to secure sufficient childcare, so far as is reasonably practicable, for working parents, or parents who are studying or training for employment, for children aged up to 14 (or up to 18 for disabled children).

To secure sufficient childcare places, the council is required to take into account:

- What is 'reasonably practicable' when assessing what sufficient childcare means in their area.
- The state of the local childcare market, including the demand for specific types of providers in a particular locality and the amount and type of supply that currently exists.
- The state of the local labour market including the sufficiency of the local childcare workforce.
- The quality and capacity of childcare providers and childminders registered with a childminder agency, including their funding, staff, premises, experience and expertise.

The council is also required to encourage:

- schools in their area to offer out-of-hours childcare from 8.00am until 6.00pm and in school holidays
- existing providers to expand their provision and new providers to enter the local childcare market

- providers to take a sustainable business approach to planning and signpost providers to resources to support them

The council is required to report annually to elected council members on how it is meeting its duty to secure sufficient childcare, and to make this report available and accessible to parents and carers.

This report covers:

- Information about the current and projected supply and demand of childcare for particular age ranges of children, and the affordability, accessibility and quality of provision
- Details of how any gaps in childcare provision will be addressed
- The current childcare sufficiency position for Birmingham in relation to children with special educational needs and disabilities; children from families in receipt of the childcare element of Working Tax Credit or Universal Credit; children with parents who work irregular hours; children aged two, three and four taking up free places; school age children; and children needing holiday care
- Priorities and actions for the future

Purpose of the report

The purpose of this report is to:

- Provide councillors, parents and other Birmingham citizens with a current picture of childcare provision and availability across the city as a whole and at district and ward level.
- Provide an analysis of whether the council is able to meet its statutory duty to ensure sufficient childcare for children aged up to 14, children with disabilities up to 18, and free early education entitlement places for 2, 3 and 4 year olds.
- Identify priorities for action to feed into the council's Early Years, Childcare and Children's Centre future plans to ensure sufficiency of childcare within the city.

Methodology

Coram Family and Childcare carried out this childcare sufficiency assessment on behalf of, and with the help of, Birmingham City Council. Coram researchers shared a draft copy of this report with Birmingham and made amendments on the basis of comments received. Birmingham also provided the 'Achievements in 2019-2021' section of the report to Coram. Ethical approval for the fieldwork was granted by Coram's Research Ethics Committee in November 2021.

Data and intelligence from a wide range of council and external sources were used to compile this report.

Primary data gathering by Coram:

- Responses by 395 Birmingham parents and carers to an online survey/consultation.
- Responses by 157 providers to an online survey/consultation.
- We spoke to a total of 36 parents and carers and 6 children. This was made up of:

- Video and telephone interviews with 15 Birmingham parents and carers, and 6 of their 30 children, users of formal childcare, recruited from among our survey respondents; and
- Discussions with 18 parents at ‘stay and play’ groups in Edgbaston, Ladywood and Yardley focusing on why parents and carers do not take up childcare, particularly when they are entitled to EEE.
- Video and telephone interviews with 3 parents in Hall Green recruited via Children’s Centres, with the same focus as above
- We spoke to a total of 13 providers and 6 ‘stay and play’ professionals. This was made up of:
 - Video and telephone interviews with 10 Birmingham childcare providers, recruited from among our survey respondents
 - Discussions with 6 staff members and 3 childminders at ‘stay and play’ groups in Edgbaston, Ladywood and Yardley.
- Interviews with 5 Birmingham employers, recruited via direct targeted approaches, with the aim of reaching a range of employer sizes and types
- A focus group with eight young people with SEND living in Birmingham (to understand their experiences of childcare and the important issues to consider for childcare for children with SEND). All were aged 13 to 17, apart from one who was aged over 18 years old.

Published information analysed by Coram (secondary data analysis):

- The Birmingham Development Plan 2031.
- Ofsted judgements of registered childcare settings and schools in Birmingham.
- Births in England and Wales ([ONS, 2021](#)).
- Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland ([ONS, 2021](#)).
- 2020 Birmingham Population Tool ([Birmingham City Council, 2021](#))
- 2011 Census data (ONS, 2012)
- Schools, pupils and their characteristics (Department for Education (DfE), 2021)

Unpublished information provided to Coram by Birmingham City Council (secondary data analysis):

- NHS population data (May 2021) Birmingham Community Healthcare Trust
- Data on 2, 3 and 4 year olds taking up their Early Education Entitlement.
- DfE eligibility checking system for children aged 3 and 4 entitled to 30 hours free Early Education Entitlement.
- DWP numbers of eligible two year olds.
- Ofsted data on registered private, voluntary and independent (PVI) childcare settings, including the number of children the setting is registered for.
- Published Admissions Numbers (PAN) for primary and nursery schools for 2, 3 and 4 year olds.

- Information provided to Birmingham in a termly survey by private, voluntary and independent (PVI) settings who provide Early Years Education, including vacancy and waiting list numbers, opening hours and fees charged from August 2021. This includes data for out of school clubs and holiday play-schemes which the providers deliver in addition to the Early Education provision.

Please note that this report presents data from the unpublished information listed above, which is from summer term 2021. This was the latest available data at the time of analysis. However, towards the end of the project we decided to update data related to take up of early education entitlements, to data from Autumn term 2021, due to the variations in this data from term to term. Also at the end of the project we produced a suite of appendices which is a ward level analysis of 0-5s demographics, provider level information, take up of EEE, vacancies and sufficiency. This is an addition to the report, and is based on more recent data from Autumn 2021. Where there is crossover of data in the report to an appendix (mainly in relation to take-up of EEE) this is noted in the text.

Profile of respondents to the parent/carer survey

395 people responded to the survey in November and December 2021, covering all 10 districts, plus 18 respondents living in neighbouring areas. Between 3 and 32 respondents per district completed the survey. The survey was publicised by Birmingham City Council and hosted on the Beheard platform. No sample frame is available and no response rate can be calculated.

We asked respondents about their relationship to their child(ren). Nearly all respondents were a parent or step-parent (97%). Seven (2%) were guardians, five were foster carers (1%) and one was another relative. We refer to all respondents as 'parents'.

Among those answering the optional question on gender, 220 (94%) were female, others being male (4.7%, n=11), or preferred not to say or to self-describe (1 each). No respondents identified as transgender.

Ages ranged from 20 to 59, with a mean average of 35. Among respondents who told us their age, 62% were in their 30s. The remaining parents were in their 20s (17%), 40s (17%) or 50s (4.5%). Parents of SEND children had a similar age range but were more spread out across decades.

By ethnicity, respondents were Asian (15%), Black (3.4%), Mixed (10%), White (67%) and other (1.3%), while 2.6% preferred not to say, meaning that in total about 30% of the sample was ethnically diverse. As NHS 2021 data identifies that 67% of children under five in Birmingham are ethnically diverse, these groups were underrepresented in the survey. Ethnically diverse respondents lived in all 10 districts, and neighbouring areas. Due to small numbers, we report on patterns of responses for white respondents compared to ethnically diverse respondents, rather than breaking down by group.

In response to the question 'what is your religion or belief', the most common answer was no religion (41%), followed by Christian (38%), Muslim (15%), Hindu (1.3%) and other (0.9%). There were no Buddhist, Jewish or Sikh respondents, and the final 3.8% preferred not to say.

Parents told us about a total of 472 children receiving childcare.¹ These children were aged under five years (62%), 5 to 7 years (22%), 8 to 11 years (14%), 12 to 14 years (2%) and 14 to 18 years with SEND (1%) (Table 1).

Twenty nine respondents told us that one or more of their children had a diagnosed Special Educational Need or Disability. Of these, two thirds were white and one third ethnically diverse. Among the parents who told us about their child(ren) with SEND, 21 were female, 5 male, and 3 did not specify their gender. They covered a good range of districts (8/10).

Overall, 9% of respondents reported that one or more of their children had SEND. Respondents with at least one SEND child told us about a total of 65 children (not all of whom will have had SEND). These children had a similar age profile to the overall sample of children.

Table 1. Age of child(ren) in receipt of childcare by percentage of respondents

Age of child(ren) receiving childcare	Percentage of children
0 to 1	11%
2	17%
3	22%
4	12%
5 to 7	22%
8 to 11	14%
12 to 14	2%
14 to 18 SEND	1%
Total	100%

Profile of respondents to the childcare provider survey

157 people responded to the survey in November and December 2021.² Their job titles included administrator, childminder, early years lead, head teacher, nursery manager, school bursar, and teacher in charge. The survey was publicised by Birmingham City Council and hosted on the Beheard platform. No sample frame is available and no response rate can be calculated.

¹ Respondents may have had other children not receiving any childcare. At the same time, the numbers may include double counting, for example if both parents in a family completed the survey separately.

² It is possible that more than one respondent per provider may have responded to the survey.

Respondents who answered the question on gender were majority female (91%), with 6% male and 3% preferring not to say. Ages ranged from 28 to 69 years, with a median of 48, and fairly even numbers of respondents in their 30s, 40s, 50s and 60s.

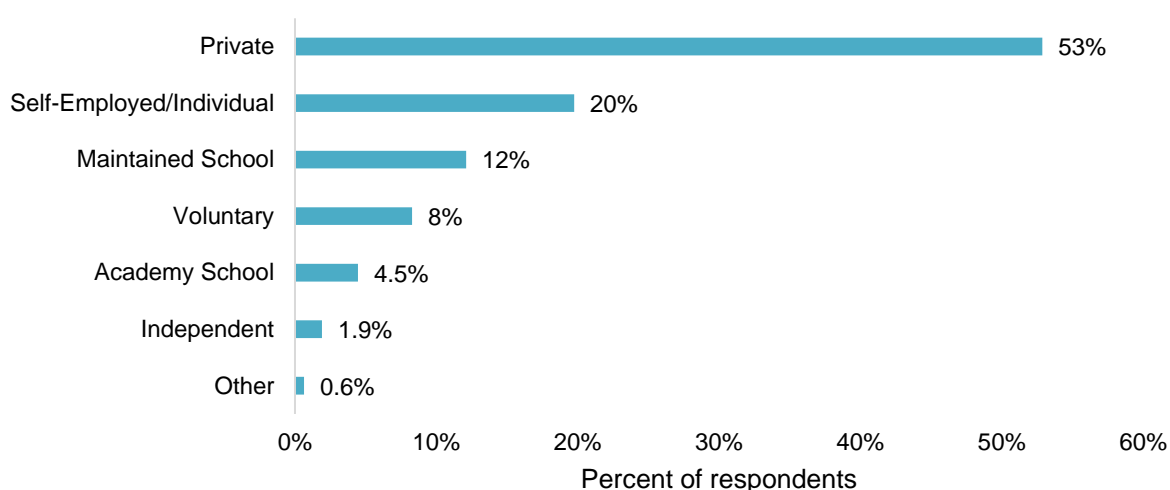
The postcodes of respondents' childcare settings covered 33 different postcode districts (such as B10), and all 10 districts. Some districts were better represented than others, with a minimum of 4 responses from Erdington and a maximum of 12 responses from Hall Green.

Among respondents answering the question on ethnic group, 21% were Asian, 2.5% Black, 2.5% Mixed, and 69% were White, while 5% preferred not to say, for a total of 26% ethnically diverse respondents.

Respondents were mostly operating in the private sector (Figure 1). They mostly represented nurseries, with over half the sample made up of private, voluntary and independent nurseries (57%), and a further 9% maintained nurseries and 8% nursery classes managed by primary schools. We also heard from 38 childminders, one nanny or au pair, and a total of 31 pre-schools playgroups, breakfast clubs, after school clubs and holiday play schemes.

Most providers (70%) did not provide childcare to any children with a diagnosed Special Educational Need or Disability, but 30% (45 providers) did. These providers were roughly split between providing childcare to one SEND child, and more than one. They told us about a total of 88 SEND children. Unsurprisingly, settings with more children in them were more likely to have at least one SEND child, so, for example, 95% of childminders had no SEND children (35/37), but over half of maintained nurseries did have at least one (7/12).

Figure 1. Sector of respondents



(n=157)

We asked which age group or groups of children the providers usually provided childcare for. The most common answer was 3 and 4 year olds (99%), followed by 0 to 2 year olds (78%), 5 to 7 year olds (31%), and 8 to 14 year olds (22%). Only two providers usually provided childcare for 14 to 18 year olds with SENDs. Over half (55%) provided childcare

to two age groups, and 84% provided it to two or more age groups, meaning 16% (25 respondents) provided childcare to only one age group (3 and 4 year olds, in all but one case).

Profile of parent, carer and child interviewees

To understand parents' views and experiences of childcare in more depth, we interviewed 15 Birmingham parents and foster carers in December 2021 to February 2022. We describe all of them as 'parents' below.

Nine parents and one foster carer responded to our survey and consented to a follow-up interview. Eight were female and two were male. We spoke to seven parents who had at least one child with SEND, or suspected SEND. Two were White and eight were from ethnically diverse backgrounds. As they were self-selected, they may have had a particular motivation for sharing their views and therefore, may not be representative of the wider population of Birmingham parents. They lived in seven out of Birmingham's 10 districts. One parent lived outside of the local authority but used childcare in Birmingham.

We also interviewed five parents from groups that are typically under-represented in research, including migrants and former asylum seekers. Four were female and one was male. To recruit these parents we contacted The Refugee and Migrant Centre and Barnardo's Ladywood District, who passed on the contact details of parents who consented for us to contact them.

Parents had up to four children each, with parents most commonly having two children. Overall, they had 30 children aged between eight months and 12 years. Six children had SEND and a further three had suspected SEND which had not been diagnosed. Parents used a range of childcare including playgroup, wraparound care, childminders, private nurseries, nursery schools, and informal childcare. Two parents did not use formal childcare.

We briefly spoke to six children aged between three and 11 – five girls and one boy - while their parents were present. Two of these children had SEND and one had suspected SEND. Interviews took place over Microsoft Teams and phone calls.

To investigate why parents and carers do not take up childcare, particularly when they are entitled to EEE, we also attended three 'stay and play' groups in three districts of Birmingham. We spoke to 18 parents, six staff members, and three childminders. We spoke to an additional three parents from a fourth district about this in one-to-one interviews. The majority of parents we spoke to about why parents do not use childcare were from ethnically diverse groups. Some parents had children with SEND. Of the 30 people spoken to in this specific investigation 28 were women and two were men. With consent, most interviews were recorded and then transcribed. Interview transcripts were analysed thematically.

Profile of childcare provider interviewees

We carried out 10 childcare provider interviews between January and February 2022 with 11 interviewees (2 members of staff joined from one provider). We have demographic information about 10 of the interviewees (excluding the member of staff who joined their colleague). Eight of the interviewees were female, one was male, and one preferred not to say. Interviewees ranged in age from 31 to 66 years with a mean of 49 years.

The providers were located across six Birmingham districts. Seven interviewees were managers of their childcare settings (both office and nursery managers), two were childminders, and one was a head teacher. All of the nursery staff worked in private, voluntary and independent (PVI) nurseries; two were private, two were registered charities, and three were voluntary. The school was an Academy school.

Profile of employer interviewees

In February 2022 we interviewed 5 Birmingham employers. These represented three large public sector organisations, including Birmingham City Council itself, employing around 1,000 to over 24,000 people, and two private sector organisations employing 32, and 152 people. Our interviewees were HR professionals, or in roles like office manager with an HR element.

The strategic context for sufficiency

Childcare underpins and supports a wide number of national and local strategies which aim to improve outcomes for children and families. They include the following:

- **Child poverty** - affordable childcare enables parents to go out to work – or work more hours – supporting overall family incomes. In general a rise in family income will result in better outcomes for children, including through being able to buy better quality, healthier food and improve living accommodation. More disposable income for holidays and general family activities contribute to a better home environment for children which contributes to better education engagement ultimately leading to better long term outcomes for children and families.
- **Social mobility** - Childcare supports the government strategy to address the widening gap between poorer and better off families by continuing to fund disadvantaged families for 2 year old Early Education Entitlement places and Tax Free Childcare Care and 30 Hours Early Years Education Entitlement places for eligible working parents.
- **Narrowing the attainment gap** - Good quality childcare provision has a significant beneficial impact for those children who attend, especially those from the age of two and from disadvantaged backgrounds.

Achievements in 2019-2021

Priority actions and progress from 2019/20 report

Covid-19 pandemic

The Covid-19 pandemic brought new unforeseen priorities. The Early Years Service had the key responsibility of ensuring sufficient childcare provision remained open across the city in order for key worker and vulnerable children to be safely looked after; and to support the early years and childcare providers as they moved towards wider opening. The team also engaged with Birmingham Community Healthcare Trust/Birmingham Forward Steps to ensure that the needs of vulnerable children and families who did not meet the criteria for childcare were safe and well and did not fall through the net.

This work was significant and included:

1. Setting up the Early Years Covid-19 Emergency Consultative group:

The group met weekly initially but fortnightly from September 2021 using Microsoft Teams, chaired by the Head of Early Years with representatives from across the early years

sector, to enable feedback on current issues being experienced on the frontline, and to enable discussion on possible solutions. This has been very positively received.

2. **Covid-19 funding to support early years and childcare providers during the various phases of Covid-19 based on latest government guidelines:**

The Early Years Team secured £3.94m from the Birmingham City Council Covid Business Recovery Fund in financial Year 2020-21, (with £200k carried forward into 2021-22) to support childcare providers operating with reduced capacities in order to meet the Covid-19 social distancing requirements set out by central government. Birmingham City Council considers that this funding was a lifeline to providers who were adversely impacted with having to isolate groups of children as a result of Covid positive tests, and with the introduction of regular testing for staff. Providers have told the council that without this funding there was a real risk of closure.

The funding covered the following phases:

- £1.824m was used to support Early Years (Under 5's) sustainability covering the first lockdown period to incentivise staying open between March 2020 and June 2020. Over 2,600 places for 0-4 year old key worker and vulnerable children were supported in PVI and school settings. £0.405m was also used to support providers with emergency bubble closures between July 2020 and March 2021 to ensure that the local authority could maintain enough childcare places for children across the city as childcare providers were unable to charge fees when children were restricted from attending due to Covid. Over 2,900 places were funded.
 - £0.653m was used to fund Out Of School Childcare (over 5's) sustainability due to school age childcare bubble closures from January 2021 to March 2021. Funding met an urgent requirement to continue to support early years and out of school childcare providers due to the significant loss of fee income triggered by central government restrictions requiring people who tested positive for Covid-19 to isolate for 10 days. Over 2,200 places were funded.
 - £0.200m was used to fund temporary bubble closures for all childcare providers for the period April 2021 to June 2021 to cover the period of the ongoing government Covid restrictions and from August 2021 to February 2022 to fund childminders experiencing a whole setting temporary closure due to Covid-19.
3. **Free School Meals vouchers through Sodexo:** Were distributed to all schools and settings, as in Early Years not all children who were usually entitled to Free School Meals were able to attend their early years setting during the initial lockdown period. Vouchers were initially provided during Easter 2020, Summer 2020, and subsequent holiday periods thereafter.
4. **Maintaining Early Education Entitlements payments to providers:** Early Education Entitlement (EEE) funding was paid to all settings based on the expected participation of children for the Summer and Autumn terms in 2020 rather than the much-reduced actual participation as directed by the DfE. This supported the financial sustainability of EEE childcare providers. Normal Early Education Entitlement head-

count funding processes were resumed in Spring 2021 although still under various phases of government restrictions.

5. **Regular communication via email to all providers including schools:** Included regular updates daily/weekly from central government and funding opportunities were managed by the local authority.
6. **Direct brokerage of childcare/Early Education to parents:** An up to date list of open providers was maintained and parents were directed to this information by the Contact Centre and to the Early Years Team for direct support and assistance from the Early Years Consultants who provided a childcare brokerage service.
7. **Development of a Risk/Self-Assessment Framework:** The Early Years Consultants Team developed and made available on the council website a document to support risk assessment in settings that was updated regularly in line with government directives. The purpose was to aid childcare providers in redesigning their provision to enable Covid-19 compliance. It linked back to national guidance from the DfE and connected to the Early Years Foundation Stage framework as inspected by Ofsted.
8. **Support for early years and childcare providers on wider opening through 1:1 sessions with Early Years Consultants:** Delivery of a universal programme of themed workshops to all providers.
9. **Working with Birmingham Forward Steps:** To target vulnerable children who did not have a social worker, to ensure that help is provided as early as possible as part of the delivery of Children's Centres.

Progress made since last CSA Report:

Since the production of the last report in 2019 the Early Years and Childcare Service has made progress in a number of areas. The work has obviously been impacted by the Covid-19 pandemic with some of the most significant work associated with this. The council believes it successfully supported providers to ensure sufficient childcare was available to meet the demand from parents and carers in Birmingham throughout all phases of the pandemic and lockdown periods. The table below describes progress against previous priority actions, which can be summarised as:

1. Action to address the fact that a number of providers, especially schools, already operating at unsustainable under-occupancy levels, may become unsustainable and have to close, or close their nursery classes;
2. Improving take-up rates of the two year old offer across the city as a whole;
3. Increasing the number and range of providers providing the two-year-old offer;
4. In specific areas, improving take-up rates of the three and four year old offers;
5. Communications with parents;
6. Strengthening existing knowledge on the demand and supply of places for out of school childcare; and
7. Strengthening knowledge of different groups of vulnerable children and their access to and take-up of childcare.

Priority area	Actions required	Work undertaken
<p>Under 5's general sufficiency - Due to the high levels of general oversupply for the childcare places for children under five, a number of providers, especially schools which are already operating at unsustainable under-occupancy levels, may become unsustainable and have to close, or close their nursery classes.</p>	<p>Undertake a survey amongst providers in wards with high levels of oversupply to confirm their financial sustainability position, assess the risk to the council's sufficiency position and identify any support the council can offer if there is a risk of closure.</p> <p>Review existing policies and procedures to identify areas in which the council's influence can be strengthened regarding the creation of new providers or places. Specifically, the review will focus on current legislation and the level of autonomy the council has to decline to fund EEE places in newly Ofsted registered provision if there is an oversupply in the ward they will be operating. The review will cover the PVI sector through the Early Education Entitlement registration process and school managed early year's provision through the PAN process (Pupil Admissions Numbers) which are both administered by the council. Any subsequent changes to policy or</p>	<p>Childcare providers from across the city have been supported with advice on business and sustainability issues from our Early Years Consultants Team either on a 1:1 basis on request or by attending generic business support sessions delivered especially during the various phases of the Covid-19 period.</p> <p>The Council has a very limited role in the new registration process undertaken by Ofsted, and DfE requirements do not allow any autonomy over newly registered provision registering for EEE irrespective of the childcare sufficiency position. However, for nursery school and nursery class governor managed provision the council still has the autonomy to agree to new or increases in provision. This is subject to existing formal processes related to the nursery school or nursery class Published Admission Numbers (PAN).</p> <p>New childcare provider briefing sessions delivered by the Early Years Consultants Team include information about where gaps in childcare exist in</p>



Priority area	Actions required	Work undertaken
	<p>procedures will be communicated to the sector in advance of any implementation.</p> <p>Encourage new providers to set up in the following wards as there are currently sufficiency gaps in childcare for children under five: Longbridge and West Heath, Holyhead, Stockland Green, Sutton Four Oaks and Handsworth Wood.</p>	<p>the city. Prospective providers are encouraged to make an informed decision regarding where they set up their newly registered provision.</p>
<p>Two year olds EEE – The Early Years Childcare and Children’s Centre Service has identified two key areas of priority action relating to the two-year old Early Years Education Entitlement.</p> <p>The first priority area focuses on improving take-up rates of the offer across the city as a whole.</p>	<p>Focus groups and discussions with parents and with parent facing professionals, such as health visitors, family support workers and social workers in wards where take-up rates are especially low, to identify key barriers to take-up in specific communities.</p> <p>Analysis of areas of the city where take-up rates are significantly higher than average to explore whether there are good practice models which can be rolled out to areas where take-up rates are low.</p> <p>Liaison with statistical neighbour councils, core cities and with key partners such as Childcare Works to learn from good practice in raising two-year old take-up rates and to feed into the council’s strategy for increasing take-up.</p> <p>Develop the current strategy for increasing take-up rates, in liaison with partners such as Birmingham Forward Steps and the Children’s Trust, to incorporate new information from the</p>	<p>A significant amount of work has been undertaken to increase the take up rates of two year-old EEE places.</p> <p>Delivery of EEE awareness raising sessions to a range of parent facing professionals to strengthen their knowledge and confidence when encouraging parents and carers to take up the offer. Over 300 children centre, health visitors, family support workers, and social workers have attended to date. Delivery of the sessions is ongoing.</p> <p>Termly production and review of 2-year-old EEE action plans delivered by the 10 district Early Years teams as part of the Health and Well Being contract the local authority has with Birmingham Forward Steps. The action plans identify what has worked well, barriers to parents accessing a place and strategies to address those barriers including the sharing of information, data and good practice. In addition, specific focus work was undertaken with the Hodge Hill and Ladywood districts of the city</p>

Priority area	Actions required	Work undertaken
	<p>previous actions. The strategy will include ongoing awareness-raising and publicity materials for parents and professionals.</p>	<p>where eligibility is high but where significant numbers of children do not access a place.</p> <p>District teams have been encouraged to talk to parents not accessing a place to identify the reasons why and try to address those barriers by giving parents information they can relate to, using local positive case studies and local parent champions.</p> <p>Specific themed sessions have been delivered to district teams focusing on the communication of the offer, parent/carer engagement, provider engagement, use of data.</p> <p>The council engaged in a project commissioned by DfE which included a mix of specific 1:1 support, small local authority cluster peer-to-peer discussion and attendance at a number of national good practice themed sessions including communication of the offer, using social media, use of data, parental engagement, provider engagement and family facing professional engagement.</p> <p>This enabled a review of existing processes to identify barriers to take-up, share good practice from colleagues nationally, and develop targeted action plans to improve take-up on a rolling sustainable basis.</p> <p>We now undertake a termly production and review of 2-year-old EEE action plans delivered by the 10 district Early Years teams as part of the Health and</p>

Priority area	Actions required	Work undertaken
		<p>Well Being contract the Council has with Birmingham Forward Steps. The action plans identify what has worked well, barriers to parents accessing a place and strategies to address those barriers, including the sharing of information, data and good practice. In addition, specific focus work was carried out with the Hodge Hill and Ladywood districts of the city where eligibility is high but where significant numbers of children do not access a place.</p> <p>Production and roll out of a short 2-year-old EEE promotional video with input from children, parents and childcare professionals highlighting the benefits to children and their families of accessing a place.</p> <p>Delivery of EEE awareness raising sessions to a range of parent facing professionals to strengthen their knowledge and confidence when encouraging parents and carers to take up the offer. Over 300 children centre, health visitors, family support workers and social workers have attended to date. Delivery of the sessions is ongoing.</p> <p>This work is not complete and will require further input and review on an ongoing basis.</p>
<p>The second priority action focuses on increasing the number and range of providers providing the two-year-old offer. Whilst there is a small oversupply of two-year-old places in</p>	<p>Encourage existing providers of universal 3-4-year-old Early Years Education Entitlement, including schools, to deliver the two-year old offer. Initially, this will focus on wards where there is a general oversupply of places but an</p>	<p>New childcare provider briefing sessions delivered by the Early Years Consultants Team include information regarding where gaps in childcare exist in the city. Prospective providers are encouraged</p>

Priority area	Actions required	Work undertaken
<p>the city, since the take-up rates are currently low, there is a need to ensure there are sufficient places to cater for an increase in take-up.</p>	<p>undersupply of two-year old places and in wards where an increase in take-up will lead to an undersupply of places relatively quickly: Aston; Glebe Farm and Tile Cross; Alum Rock; Small Heath; and Bromford and Hodge Hill wards. Actions will also include establishing reasons for gaps, assessing likelihood of an increase in demand, and identifying actions required to ensure ongoing sufficient childcare.</p> <p>Encourage new providers to set up in areas where there is an undersupply of places for two-year olds and for the whole under five age group. This work will focus on Bordesley & Highgate, Holyhead and Stockland Green wards.</p> <p>Increase the number of primary schools delivering 2-year-old EEE places. This will begin with a survey of primary schools on the barriers to offering two-year old places and incentives which would encourage them to offer it. Liaison to discover good practice will also be carried out with councils where schools offer a significant proportion of two-year old places and with partners such as Childcare Works. This initial work will feed into the development of a strategy for increasing the number of two-year old places in schools.</p>	<p>to make an informed decision regarding where they set up their newly registered provision.</p> <p>A survey of schools was carried out in September 2019. The key issue/barrier identified for schools with nursery classes to deliver 2-year-old EEE places was that the cost of delivery was too high and not covered by the hourly rate (NB the council passport the 2-year-old rate in full, meaning that the council pass on 100% of funding received from central government to childcare providers.). The main issue was staffing costs as staff to child ratios are 1:4 compared to 1:8 for non-teacher led delivery and 1:13 for teacher led delivery for 3 and 4-year olds. This has been a complete barrier to expanding 2-year-old delivery in schools.</p>

Priority area	Actions required	Work undertaken
<p><i>Three and four year olds EEE (15 hours universal entitlement, 30 hours for eligible working parents and Tax Free childcare)</i> – Take-up rates of the three and four year old offers are reasonably high across the city and there is an over-supply of places for children under five years old, so the actions against this priority aim to improve the position in specific areas.</p>	<p>Develop ward-specific action plans where take-up rates are low. This will include analysis and exploration of key barriers using focus groups and discussions with parents and with parent facing professionals, such as health visitors, family support workers and social workers and an exploration of good practice in areas where take-up rates are high.</p> <p>Extend the termly data survey to schools in order to strengthen the council’s intelligence and help inform ongoing support strategies. For example, this will improve the data the council holds on vacancies, waiting lists, opening times, tax-free childcare, and partnership working.</p> <p>Continue the ongoing communications strategy with childcare providers from all sectors and other child facing professionals such as Children Centres and health visitors to raise awareness and encourage participation by promoting the benefits to children and families and the business opportunities the offers bring.</p> <p>Encourage providers to work in collaboration with other providers i.e. school with a childminder or full day care nursery to support parental needs and maintain sustainable</p>	<p>This work was not undertaken separately but was included in all the 2-year-old EEE work including:</p> <p>Delivery of EEE awareness raising sessions to a range of parent facing professionals.</p> <p>Termly production and review of action plans delivered by the 10 district Early Years teams as part of the Health and Well Being contract the Council has with Birmingham Forward Steps.</p> <p>District teams encouraged to talk to parents not accessing a place to identify the reasons why, and try to address those barriers, by giving parents information they can relate to, using local positive case studies and local parent champions.</p> <p>Specific themed sessions have been delivered to district teams focusing on the communication of the offer, parent/carer engagement, provider engagement, use of data.</p> <p>Communications are rolled-out on a continued basis with relevant messages to the various stakeholders on a termly basis.</p>

Priority area	Actions required	Work undertaken
	business models especially in those wards where there is an over-supply of places.	
<p>Communications with parents – Parent consultation will be a key priority for the coming year.</p>	<p>Undertake a parental survey using Be-Heard to explore the parental/carer perspective regarding childcare in the city, focusing on access, availability, affordability, school-age childcare, meeting specific needs and barriers to access.</p> <p>The consultation will also include focus groups in specific wards to explore in more depth barriers to access, specifically for two-year-old Early Years Education.</p> <p>The results of the parent consultation will feed into next year’s sufficiency report and to strategies to improve take-up and to manage the childcare market.</p> <p>Produce and share communication with parents via Birmingham City council website and social media to raise awareness of early education entitlements and promote the benefits to children and families.</p>	<p>Parent consultations took place in March 2020 and November 2020 and were used to inform the ongoing delivery of services during the COVID-19 pandemic.</p> <p>A video was produced and made available on the council website.³</p> <p>A requirement for an extensive, detailed and targeted consultation with parents was also built into the specification for the 2021 Childcare Sufficiency Assessment (CSA).</p> <p>The renewed CSA (this document) will have a greater understanding of the barriers parents experience to access childcare.</p>
<p>Out of School Sufficiency – The Early Years, Childcare and Children’s Centres Services will strengthen existing knowledge regarding demand</p>	<p>Parent consultation to provide a more accurate picture of the needs for out of school provision across the city.</p>	<p>The out of school sufficiency position is a challenge as it is very much in a transition stage due to the impact of Covid-19. Parent/carer demands are still settling down due to greater flexible working</p>

³ https://www.birmingham.gov.uk/info/20130/childcare_and_early_years/629/free_childcare_and_education_for_2_to_4_year_olds

Priority area	Actions required	Work undertaken
<p>and supply of places for out of school childcare to more accurately determine the level of sufficiency of before and after school clubs and holiday play schemes.</p>	<p>Extension of the termly data survey to schools and to PVIs which do not provide EEE, to provide a more complete and consistent set of data around current provision of out of school childcare.</p> <p>Targeted communications to providers to encourage engagement with the council from schools and PVI providers not providing EEE.</p>	<p>opportunities, meaning lower or more flexible demands of parent/carers, which the sector will need to react to regarding the supply of places. The renewed CSA will fully explore the needs of this parent/carer group.</p> <p>During Covid-19, there were elements of this work undertaken where daily and weekly surveys were administered collecting data at a very high level. There is still further work required in this area.</p>
<p>Vulnerable children – The Early Years, Childcare and Children’s Centres Service will prioritise the strengthening of existing knowledge regarding different groups of vulnerable children and their access to and take-up of childcare. Develop a strategy to enable partners to work together to raise awareness of the benefits of taking up Early Years Education, target and address barriers to access, and monitor take up.</p>	<p>Develop a data strategy for identifying and sharing relevant data sets with key partners and colleagues such as the Children’s Trust, to ensure a broader and reliable picture of childcare demand, access and take-up for vulnerable children.</p> <p>Engage with other parent-facing professionals such as health visitors and social workers to raise awareness of Early Education Entitlements and the benefits to children and families. This awareness-raising will enable other professionals to have the confidence to encourage take up with parents and to signpost parents to good quality provision.</p>	<p>At the outset of the Covid-19 pandemic we worked closely with Birmingham Children’s Trust to identify vulnerable children under five, as well as those of school age, to ensure that all those who needed to be attending a setting were able to access a place. The matching of data sets for this urgent piece of work has enabled a longer-term sharing of data which we intend to embed within strategy and procedure over the next year.</p> <p>Delivery of EEE awareness raising sessions has been undertaken to a range of parent facing professionals to strengthen their knowledge and confidence when encouraging parents and carers to take up the offer. Over 300 children centre, health visitors, family support workers, and social workers have attended to date. Delivery of the sessions is ongoing.</p>

Birmingham's population

This section outlines the potential demand for childcare in Birmingham based on the latest available demographic data. It covers the under-fives population, characteristics of children and households, early years education populations, out of school and holiday childcare populations, and housing developments.

Wards

Birmingham is currently made up of 69 wards (See Figure 2 below). This report uses data on both a ward and a district basis for the 2019-2021 time period.

Figure 2. Birmingham ward map (2018)



Birth rates and under-fives population

Birmingham is a comparatively young city in terms of its demographic make-up; it has a child dependency ratio (dependents aged 0-15 years per 1,000 working age adults) of 350 compared to 308 for England overall (Birmingham City Council, 2021). In 2020 there were 14,991 live births in Birmingham, a slight decrease from 15,483 in 2019 ([ONS, 2021](#)). The birth rate in Birmingham has fluctuated since 2013, and families move within, and in and out of the city; as of June 2020 net internal migration for Birmingham (residential moves between local authorities in the UK) was -13,356 and net international migration was 6,869 ([ONS, 2021](#)). Therefore the broader under-fives population is used to identify the overall potential demand for childcare.

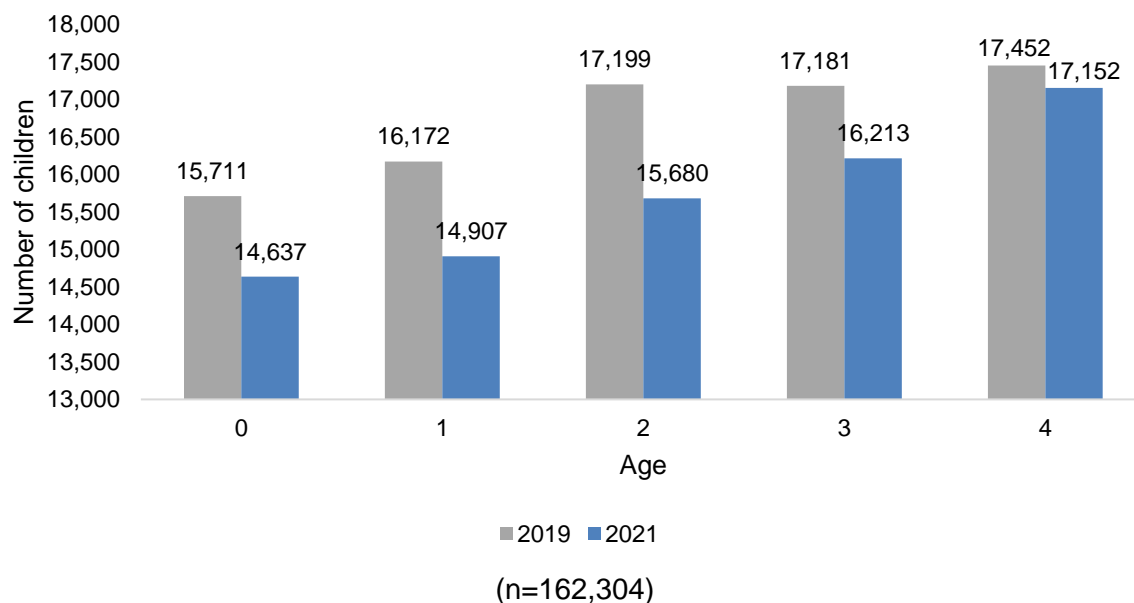
According to the latest NHS population data, for May 2021, there are 78,589 under-five years living in Birmingham. This is a decrease of 5,126 (6%) from the 83,715 under-fives living in Birmingham in 2019.

The latest available Office for National Statistics mid-year population estimates, for 2020 ([ONS, 2021](#)), show Birmingham had 287,509 children aged under 18, or 241,851 aged up to and including 14 years. Consistent with the decrease in the number of children under five in the NHS population data, mid-year population estimates from the ONS (2021, 2020) show that the number of under-fives as a proportion of the total population in Birmingham fell slightly between 2019 (7.15%) and 2020 (6.98%).

Table 2. Population of under-fives in Birmingham and changes, 2019 to 2021 (NHS under 5s list, May 2021)

Age	Number in 2021	Rise/fall	Percentage change
0	14,637	-1,074	-6.8%
1	14,907	-1,265	-7.8%
2	15,680	-1,519	-8.8%
3	16,213	-968	-5.6%
4	17,152	-300	-1.7%
Total	78,589	-5,126	-6.1%

Figure 3. Number of Birmingham under-fives in 2019 and 2021



The population of under-fives fell in all districts between 2019 and 2021. The largest percentage point decrease was in Hall Green (9%) and the smallest was in Selly Oak, Sutton Coldfield, and Yardley (4% decrease in each). Sutton Coldfield is the district with the lowest number of children under-five years - 4,913. The district with the highest number of children under-five years is Hodge Hill with 11,604 children.

Out of school and holiday childcare population

Older children may also need childcare, particularly before or after school, and/or in the school holidays. Out of school childcare includes breakfast and after school clubs and holiday childcare or play schemes. The potential number of children requiring childcare to fit around the school day or during school holidays could, therefore, be all children in school. If all school children living in Birmingham aged 4 to 14 required school provision, the demand would be 178,721 places ([Birmingham City Council, 2020](#)).

Children who access their Early Years Education entitlement whose parents pay for additional hours childcare receive 'wraparound' childcare. Across the city, the proportion of children accessing wraparound in Autumn term 2021 was 22%, compared to 24% in 2019. This varied widely across wards with nearly 0% in Alum Rock, Garetts Green, Handsworth and Sparkhill, and 76% in Edgbaston, which was also a high outlier in 2019. By district, the highest was 47% among children resident outside Birmingham (the highest among Birmingham districts being Sutton Coldfield at 43%), and lowest at 7% in Hodge Hill.

If 22% of all the 178,721 school children aged 4 to 14 required out of school provision, demand would total 39,319 children. In reality the factors determining need for formal out of school childcare include:

- parents' working arrangements and shift patterns;
- the availability to families of informal childcare, such as other family members or parents of children in the same school sharing childcare to meet parents' working patterns;

- parents entering the workplace once their youngest child starts at school – the cost of pre-school childcare can be prohibitive for parents returning to work, but this is less likely at school age;
- the age of the child – parents of children aged over eleven are less likely to need before and after school care but may still require holiday childcare for some or all of the school holiday.

Ethnic diversity

Birmingham is an ethnically diverse city. NHS 2021 data identifies that 67% of children under five (47,685) are Black, Asian, Mixed or Other, others being White. The proportion of these under-fives in Birmingham has risen by 1% from 63% in 2019. According to the 2011 Census, only 24% of under-fives in England and 29% of under-fives in the West Midlands are from ethnically diverse backgrounds ([Census, 2011](#)).

In Birmingham, Ladywood District has the highest percentage (90%) and number (8,770) of under-fives from ethnically diverse groups. Sutton Coldfield has the lowest percentage (27%) and number (1,292) of under-fives who are ethnically diverse. The proportion of ethnically diverse children in each district has not varied considerably since 2019. The biggest change was a rise of 4% in Erdington and in Yardley.

In nursery classes in schools in Birmingham 65% of pupils are from Black, Asian, Mixed or Other backgrounds, compared to 27% of pupils in England overall ([DfE, 2021⁴](#)), and 34% of pupils in the West Midlands region ([DfE, 2021](#)). In Birmingham, this includes 980 children from Gypsy/Roma backgrounds (0.5%) and 30 children from traveller (Irish heritage) backgrounds ([DfE, 2021](#)). The percentage of children in nurseries in Birmingham from these backgrounds is similar – 63%, and includes 10 children from Gypsy/Roma backgrounds (0.3%) ([DfE, 2021](#)).

In 2020/21 the percentage of nursery and primary school pupils who had English as an additional language was much higher in Birmingham (38% and 42%), than the West Midlands region (29% and 22%) and England overall (29% and 21%) ([DfE, 2021](#)).

Special educational needs (SEN)

Children with special education needs and disabilities (SEND) are entitled to support with childcare up to the age of 18 (age 14 for children who do not have a special need or disability). In 2020/21 3% of pupils in all schools and nurseries in Birmingham had EHC plans/ statements of SEN and 14% had SEN support (Table 3). Similar percentages of pupils in the West Midlands and England had EHC plans/statements of SEN – 4% in both. A slightly lower proportion of pupils received SEN support in the West Midlands (13%), and England (12%) ([DfE, 2021](#)).

In England, NHS Digital reports that 12% of children received an appointment within 13 weeks for an autism diagnosis ([NHS Digital, 2021](#)). By comparison, in Birmingham and Solihull Mental Health NHS Foundation Trust, 10% of children received a first appointment for a diagnosis of autism within 13 weeks. The average waiting time between referral and diagnosis is 333 days in England and over one year in Birmingham and Solihull ([NHS Birmingham Community Healthcare, 2021](#)).

⁴ Data does not include independent schools.

In state-funded nurseries in Birmingham, 1% of children had EHC plans/statements of SEN and 15% had SEN support. The percentages were comparable in the West Midlands – 1% and 14% respectively. In England, 1% of nursery pupils had EHC plans/statements of SEN and 13% had SEN support ([DfE, 2021](#)).

Table 3. SEN provision by type of school and type of provision, 2020/21

Type of school	Percentage with EHC plans/ Statements of SEN	Percentage with SEN support
Independent school	5%	7%
Pupil referral unit	7%	90%
State-funded nursery	1%	15%
State-funded primary	1%	15%
State-funded secondary	1%	13%
State-funded special school	100%	100%
Total	3%	14%

Looked after children

In Birmingham, there were 1,921 looked after children on 31 March 2021. The largest age group was 10 to 15 years (39%), 23% of looked after children were under 5 years, 20% were 16 years and over and 19% were 5 to 9 years. This broadly reflects the age groups of looked after children nationally, although there is a slightly higher percentage of children under 5 years that are looked after in Birmingham than nationally (23% compared to 19%), and a lower percentage of looked after children that are 16 years and over in Birmingham than nationally (20% compared to 23%) ([DfE, 2021](#)).

Workless households, income and free school meals

In 2020 Birmingham had a higher percentage of workless households (17.4%) than the West Midlands (14.8%) and England (13.0%) ([ONS, 2021](#)). The percentage of workless households in Birmingham has only risen marginally since 2019 (16.7%) ([ONS, 2021](#)).

The median annual pay in Birmingham has risen by 3.0% in the last year to £23,434. Median wages are higher in England (£26,192) and the West Midlands (£25,000), but the *rate* of increase in the last year was higher in Birmingham – pay in England overall rose by 0.1%; in the West Midlands pay rose by 1.3% ([ONS, 2021](#)). In Birmingham, Northfield saw the highest median annual pay increase of 12.8% while Hodge Hill saw the biggest decrease of 6.6%.

In Birmingham in 2020/21 35% of pupils were eligible for free school meals. This is considerably higher than in the West Midlands, 24.5% and England, 20.8% ([DfE, 2021](#)).

The Birmingham Development Plan 2031

The Birmingham Development Plan 2031 (BDP) was adopted by Birmingham City council in 2017. It sets out a vision for the sustainable growth of the city. It is the City's statutory planning framework guiding decisions on all development and regeneration activity to 2031. The BDP sets out how and where new homes, jobs, services and infrastructure will be delivered and the type of places and environments that will be created.

The plan is therefore a factor when considering early education and childcare services in the city as areas are developed or redeveloped, especially new housing.

Housing developments in progress and planned

There is a significant amount of new housing currently under construction or planned across the city to meet existing and future requirements. In total, 38,673 new dwellings are due to be built, with the majority being built within the next 10 years. However, these still need to be considered due to the likely phased building approach and associated requirement for discussions with developers regarding potential demand requirements for early education and childcare places that can be factored into the housing development planning process. Elsewhere in this report, our analysis of the excess of available places shows these requirements should be able to be absorbed within existing childcare capacity.

Table 4. Planned housing developments in the short, medium and long term

Cohort	Number of dwellings to be built
Short term (<5 years)	17,137
Medium term (6-10 years)	13,864
Long term (10+ years)	7,672
Total	38,673

Birmingham applies a formula of 42 places per 'year group' per 1,000 new houses for primary age children, assuming three bedrooms per new home. New housing developments could generate the need for 1,623 new early years places (Table 5).

Table 5. Projected places required based on planned housing developments

Cohort	One 'year group' (42 places) of early years places required
Short term (<5 years)	720
Medium term (6-10 years)	582
Long term (10+ years)	321
Total	1,623

The wards with the most planned housing developments are predominantly in the city centre. Bordesley & Highgate has most planned housing developments, where 8,737 new dwellings are planned, generating the need for 367 early years places for one year group. Ladywood follows, generating the need for 288 early years places for one year group and Soho & Jewellery Quarter is in third place, generating 132 places for one year group.

Childcare providers

This section details the current extent and nature of childcare provision, including day care, out of school clubs and holiday play schemes. It covers the number of providers and places, opening hours, vacancies, quality, costs, extended entitlement and transitions.

Number of childcare providers

Childcare providers fall into the following categories with the majority being Ofsted registered:

- Private, Voluntary and Independent (PVI): Childminders (CM), Day Nurseries (DN), Holiday Play Schemes (HPS), Out of School Clubs (OOSC), Pre-School Play groups (PSP)
- Schools: Nursery Schools (NS), Nursery Classes school governor run (NC) and, Special Schools (SS)

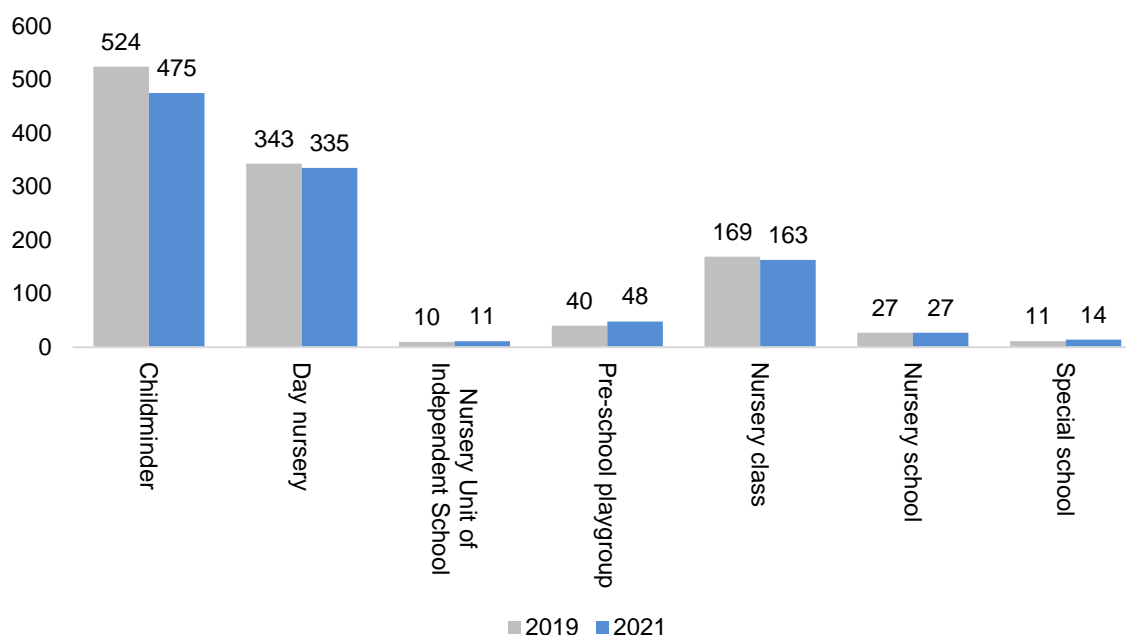
In August 2021 there were 869 PVI childcare providers in Birmingham. This has fallen by 5% since 2019 when there were 917 childcare providers (Table 6). This is in-line with national and regional trends - the number of childcare providers across England declined by 4% between August 2020 and August 2021 and childcare providers in the West Midlands declined by 3% in the same period ([Ofsted, 2021](#)).

In Birmingham there are now more pre-school playgroups and nursery units of independent schools (NUIS), but 49 childminders and 8 day nurseries have ceased to operate. Hall Green is the district with the highest number of providers in Birmingham which stands at 105. Erdington has only 55, the lowest number of providers.

Table 6. Number of childcare providers by type and year, 2019 and 2021

Type of provider	2019	2021	Rise/fall	Percentage change
Childminder	524	475	-49	-9%
Day nursery	343	335	-8	-2%
Nursery Unit of Independent School	10	11	+1	+10%
Pre-school playgroup	40	48	+8	+20%
Total PVI	917	869	-48	-5%
Nursery class	169	163	-6	-4%
Nursery school	27	27	0	0%
Special school	11	14	+3	+27%
Total schools	207	204	-3	-1%
Total providers	1,124	1,073	-51	-5%

Figure 4. Number of childcare providers in Birmingham by type, 2019 and 2021



Childcare places

For private, voluntary and independent nurseries and childminders, the number of registered places represents the maximum number of children who can be on the premises at any given time. In practice, many providers choose to operate below their number of registered places.

The number of places and vacancies fluctuate during the year. However, there is known seasonality. Generally, demand and occupancy levels are at their lowest levels in the Autumn term, due to children starting school. This brings financial challenges to providers as income streams can often be lower than the Spring and Summer terms, therefore providers need to undertake sound financial planning throughout the year and factor in lower Autumn term income streams.

There were 24,247 early education and childcare places in PVI settings in Birmingham in 2021⁵, a 2% increase from 23,670 for the same reporting period in 2019 (Table 7). Nationally and in the West Midlands region, the number of childcare places declined by 1% between 2020 and 2021 ([Ofsted, 2021](#)). Childminder places have decreased but day nursery, NUIS, and pre-school playgroup places have risen in Birmingham. Among districts, Edgbaston had the highest number of places, 3,353, and Erdington had the lowest, 1,397.

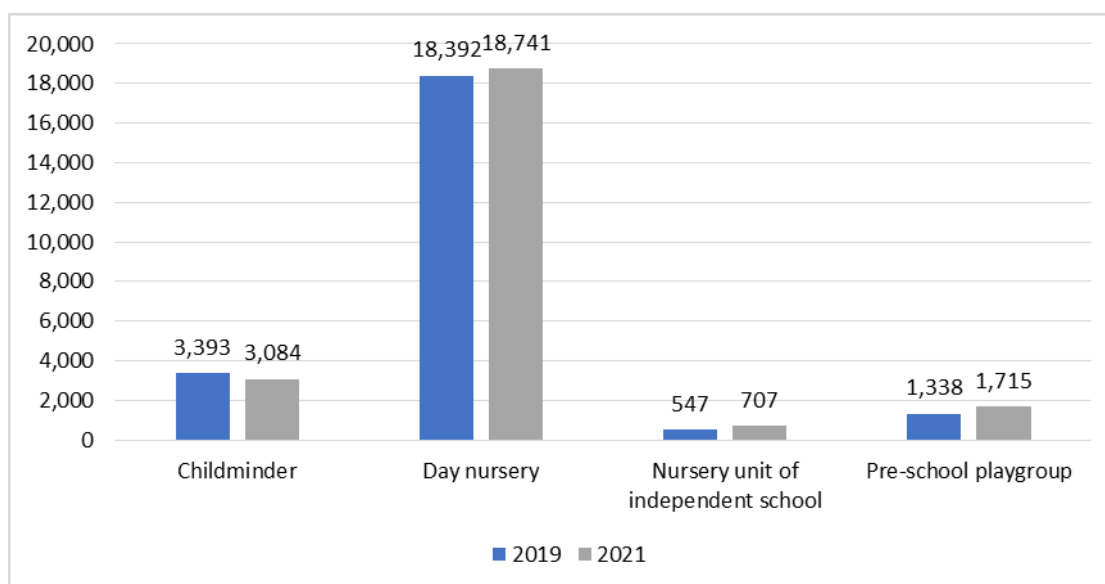
Table 7. Number of childcare places in Birmingham by type of PVI provider and year, 2019 and 2021

Type of provider	2019	2021	Fall/rise	Percentage change

⁵ This is the figure as reported in August 2021. In line with seasonality trends, there were 23,516 places reported in December 2021.

Childminder	3,393	3,084	-309	-9%
Day nursery	18,392	18,741	349	+2%
Nursery Unit of Independent School	547	707	160	+29%
Pre-school playgroup	1,338	1,715	377	28%
Total	23,670	24,247	577	2%

Figure 5. Childcare places by type of PVI provider and year, 2019 and 2021



The total number of places in EEE registered PVI settings reported in August 2021 is 22,427. This has risen by 4% from 21,487 in the same reporting period for 2019 (Table 8). NUIS and day nursery places have risen; childminder and pre-school playgroup places have fallen. Edgbaston has the highest number of places in EEE registered settings in Birmingham, 2,973, and Erdington has the lowest, 1,384.

Anyone who cares for children under the age of eight for more than two hours a day in England must register with Ofsted. It is an offence to provide such childcare without being registered or on premises that have not been approved.

There are two Ofsted registers:

- **the Early Years Register** – for providers caring for children aged from birth to 31 August following their fifth birthday; providers on this register must meet the ‘Statutory framework for the Early Years Foundation Stage’.
- **the Childcare Register**, which has two parts:
 - Part A: Compulsory – for providers caring for children from 1 September after the child’s fifth birthday up until their eighth birthday; and

- Part B: Voluntary – for providers caring for children aged eight and over, and other providers who are exempt from compulsory registration, such as nannies.

Table 8. Number of EEE places in Birmingham by provider, 2019 and 2021

Type of provider registered for EEE places	2019	2021	Rise/fall	Percentage change
Childminder	2,295	2,190	-105	-5%
Day nursery	17,454	18,503	+1,049	+6%
Nursery Unit of Independent School	405	560	+155	+38%
Pre-school playgroup	1,175	1,010	-165	-14%
Other	158	164	+6	+4%
Total PVI EEE places	21,487	22,427	+940	+4%
Nursery class in primary school	6,529	6,477	-52	-0.8%
Nursery school	2,701	2,255	0	0%
Total school EEE places	9,230	9,178	-52	-0.6%
Total EEE places	30,717	31,605	+888	+3%

Information on EEE places for primary and nursery schools is available through the Published Admissions Numbers (PAN) report. The number of full-time places in schools providing EEE in Birmingham is 9,178. The number of part-time places in schools providing EEE is 18,356. School places have fallen very slightly from 9,230 full-time places and 18,460 part-time places in 2019 but as shown in Table 8 this change was only in nursery class places.

Opening hours

Provider opening hours tend to be based on parental demand. They can vary by provider type. Day care opening times at weekends, before 7am and after 6pm have decreased slightly since 2019 (Table 9; data collected Summer 2021). These opening hours vary by ward to the extent that are some districts with little to no day care provision outside of traditional opening hours. For example, of the 70 day care providers in Sutton Coldfield, none are open before 7am, after 7pm, or on weekends.

Table 9. Percentage of day care providers in Birmingham which open at weekends, in early mornings, in the evening and which operate on less than 5 weekdays

Opening times	2019 – percentage of providers	2021 – percentage of providers	Percentage point change
Weekends	6%	3%	-3%
Before 7am	3%	2%	-1%

After 6pm	13%	12%	-1%
Fewer than 5 weekdays	6%	6%	0%

In Summer 2021, 168 EEE providers reported that they were open outside of core school hours. Out of school providers opening at weekends, before 7am and after 6pm have risen since 2019; providers open less than five weekdays have fallen (Table 10).

Table 10. Percentage of out of school providers in Birmingham which open at weekends, in early mornings, in the evening and which operate on less than 5 weekdays

Opening times	2019 – percentage of providers	2021 – percentage of providers	Percentage point change
Weekends	2%	5%	+3%
Before 7am	3%	4%	+1%
After 6pm	17%	21%	+4%
Fewer than 5 weekdays	19%	15%	-4%

Birmingham’s previous childcare sufficiency assessment also reported on providers that were open after 7pm (5%) and which provided overnight care (7 childminders).

According to data collected from EEE providers by Birmingham City Council in Summer 2021, 126 providers offered childcare during the holidays. As shown in Table 11 below, the majority of these providers offered childcare within traditional working hours.

Table 11. Percentage of holiday providers in Birmingham which open at weekends, in early mornings, in the evening and which operate on less than 5 weekdays

Opening times	2021 – percentage of providers
Weekends	2%
Before 7am	2%
After 6pm	11%
Fewer than 5 weekdays	15%

Vacancies

Vacancy rates are a snapshot and may change rapidly. Providers may have a vacancy which is only available for a specific age group of children, or for a particular part time arrangement.

The 2021 data show that there are vacancies for early years, out of school and holiday childcare, suggesting an oversupply of places. In England as a whole, the [Coram Childcare Survey 2021](#) found that the use of childcare had decreased since the pandemic, as families reduced or stopped working, either temporarily or permanently, and were

concerned about the spread of Covid-19 within childcare settings. Alongside the fall in Birmingham's under-fives population, this could help explain the substantial rises in vacancies since 2019.

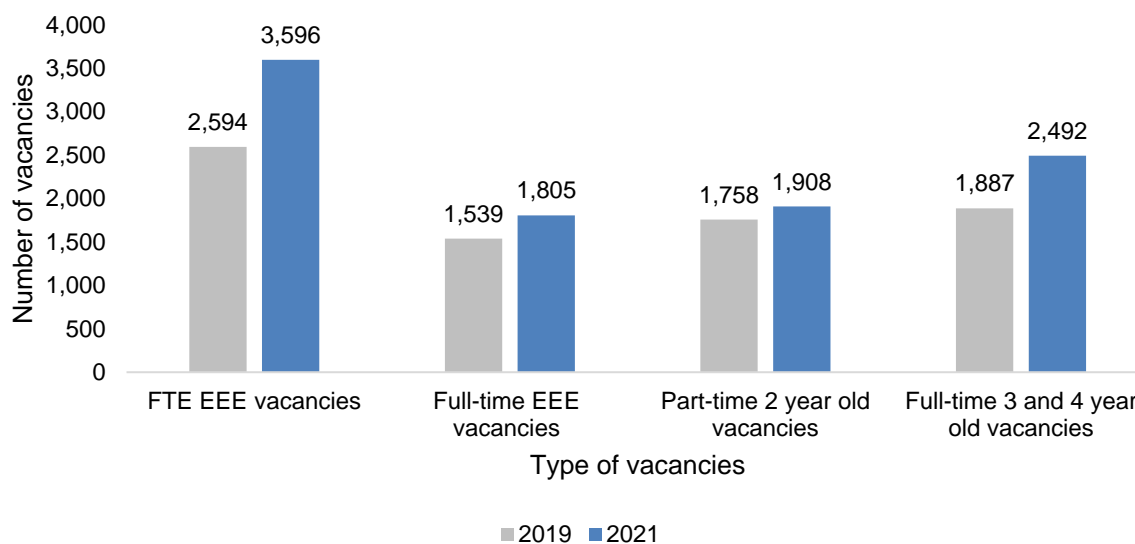
Vacancies in EEE registered settings

EEE vacancies have risen considerably since 2019, particularly full-time vacancies (Table 12). Of districts in Birmingham, Ladywood had the highest number of vacancies in EEE settings (2,074). By contrast, Sutton Coldfield had only 333.

Table 12. Early years vacancies in Birmingham by type and year, 2019 and 2021

Type of vacancy	2019	2021	Rise/fall	Percentage change
Full-time vacancies in schools	2,594	3,596	+1,002	+39%
Full-time EEE vacancies in PVI settings	1,539	1,805	+266	+17%
Part-time 2 year old vacancies	1,758	1,908	+150	+9%
Full-time 3 and 4 year old vacancies	1,887	2,492	+605	+32%
Total	7,778	9,801	+2,023	+26%

Figure 6. Early years vacancies by type and year, 2019 and 2021



Out of school vacancies in EEE registered settings

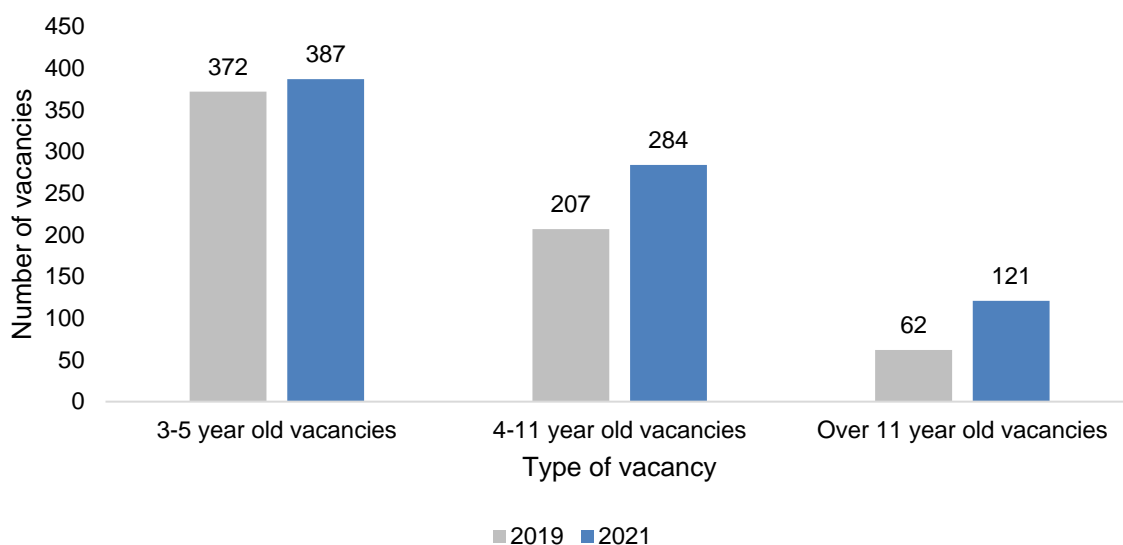
Out of school vacancies have also risen since 2019, particularly for over 11 year olds (Table 13). For a ward level breakdown see Appendix 9. Hall Green had the most out of school vacancies, 155, and Edington had the least – only 11.

Table 13. Out of school vacancies in Birmingham by type and year, 2019 and 2021

Type of vacancy	2019	2021	Rise/fall	Percentage change
-----------------	------	------	-----------	-------------------

3 to 5 year old vacancies	372	387	+15	+4%
4 to 11 year old vacancies	207	284	+77	+37%
Over 11 year old vacancies	62	121	+59	+95%
Total	641	792	+151	+24%

Figure 7. Out of school vacancies in Birmingham by type and year, 2019 and 2021



Holiday vacancies in EEE registered settings

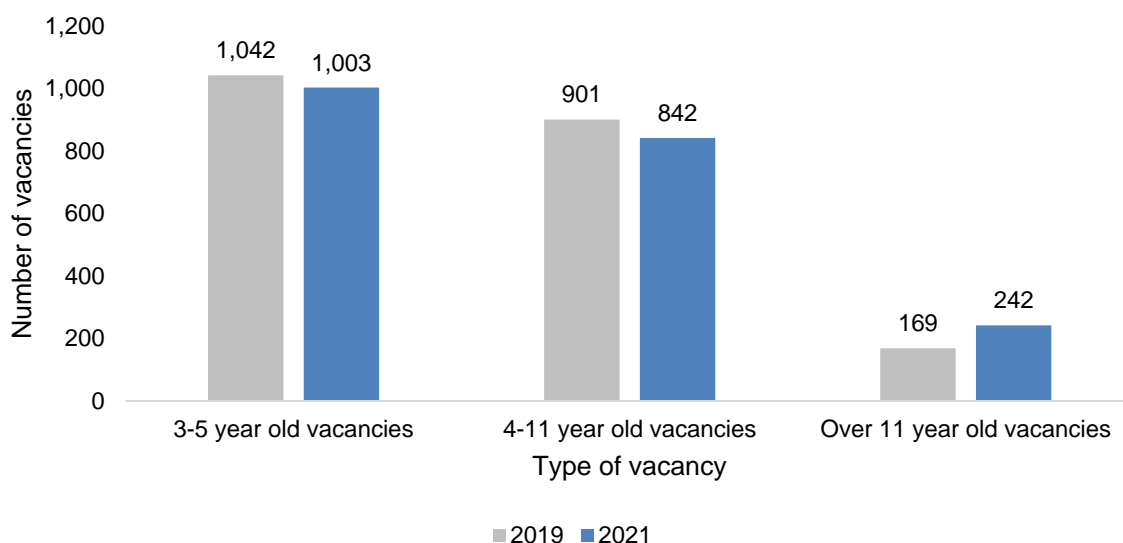
Overall holiday vacancies have fallen slightly, but over 11 year old vacancies have risen substantially (

Table 14). For a ward level breakdown see appendix 10. Yardley had 460 holiday vacancies, the highest number of holiday vacancies in Birmingham; Sutton Coldfield had the lowest with 15.

Table 14. Holiday vacancies by type and year

Type of vacancy	2019	2021	Rise/fall	Percentage change
3 to 5 year old vacancies	1,042	1,003	-39	-4%
4 to 11 year old vacancies	901	842	-59	-7%
Over 11 year old vacancies	169	242	+73	+43%
Total	2,112	2,087	-25	-1%

Figure 8. Holiday vacancies in Birmingham by type and year, 2019 and 2021



Childcare uptake

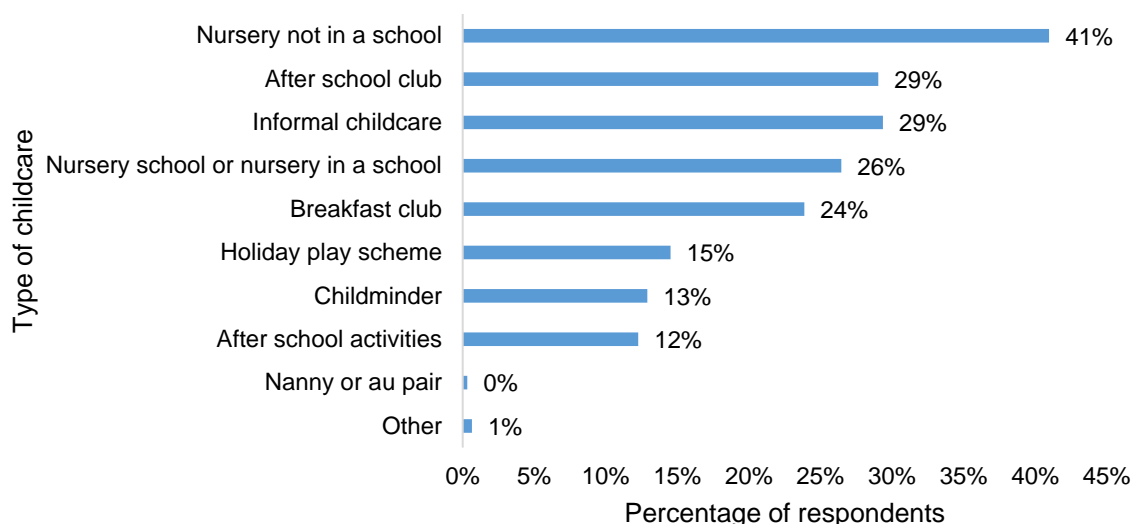
Type of childcare used

Our survey of parents found that the most common type of childcare used was a nursery not in a school (41%) (Figure 9). After school clubs and informal childcare were both used by 29% of respondents, while 26% used nursery schools or nurseries in schools, and 24% used breakfast clubs. Respondents could select more than one type, and reported using up to seven types. Over half (57%) used more than one type, and 43% just one type. Parents may have been using other provision they did not consider 'childcare', for example after school or holiday activities.

In comparison to white respondents, ethnically diverse respondents more often told us they used childminders and breakfast clubs, and after school activities less often (5 to 6 percentage point differences). But the largest difference was for informal childcare, used by 32% of white respondents and 23% of ethnically diverse respondents. Other childcare types had small or no differences.

Parents of at least one SEND child were more likely than other parents to report making use of informal childcare (43% compared to 28%). Other differences were smaller, with SEND families making slightly less use of childminders, breakfast clubs, after school clubs and holiday play schemes.

Figure 9. Type of childcare used by percentage of respondents

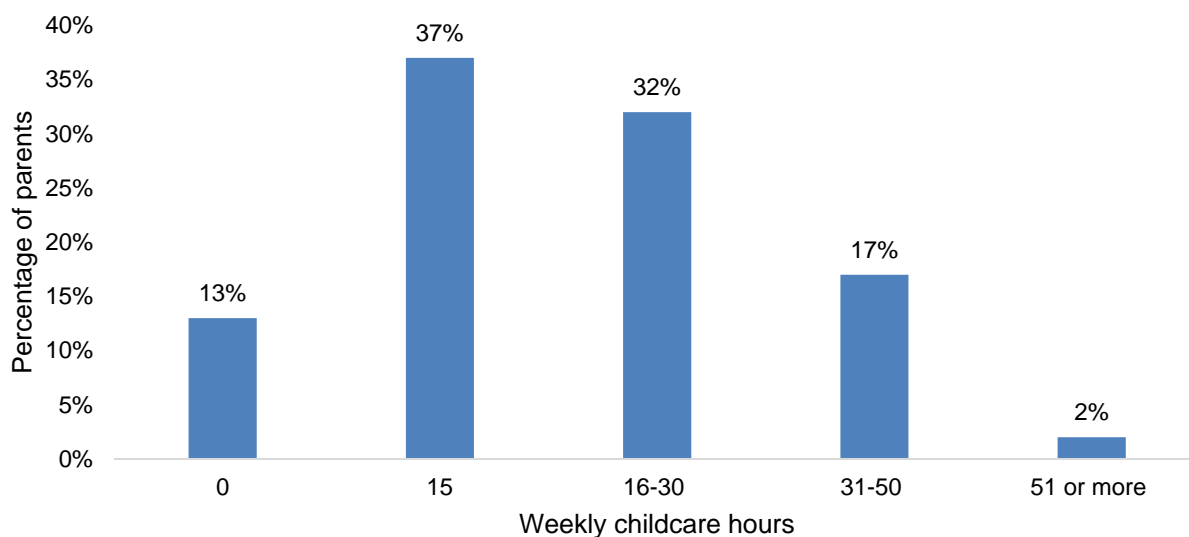


(n=310)

Weekly childcare hours and days used by children of school age

Over a third of respondents told us their school age children were in childcare for 15 hours or less each week (37%) and just under a third said they were in childcare for 16 to 30 hours a week (32%) (Figure 10). The pattern was similar for SEND families and ethnically diverse respondents.

Figure 10. Childcare hours of school age children

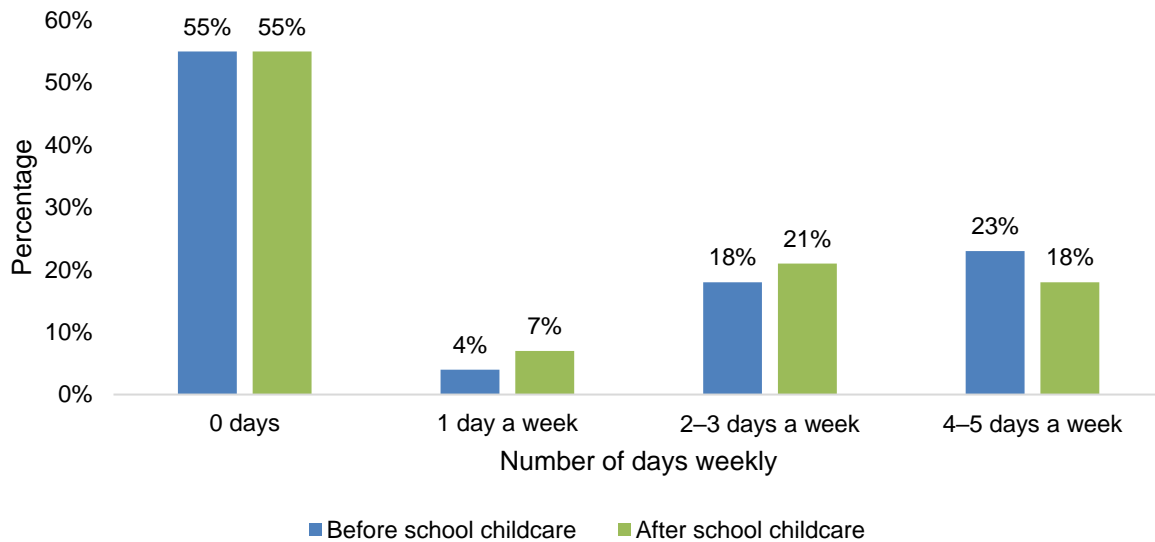


(n=297)

Childcare is most commonly delivered during the typical working day – between 8am and 6pm on weekdays. Some parents require childcare outside these times in order to fit with their work or other responsibilities. The majority of parents we surveyed (55%) reported that their children did not attend childcare before or after school on a weekly basis (Figure 11). Approximately a fifth used before and after school childcare 2 to 3 days a week and 4 to 5 days a week. The pattern was similar for ethnically diverse respondents, though the

small number of SEND families were more split between either heavy or light use of wraparound school childcare.

Figure 11. Days per week before and after school childcare was used

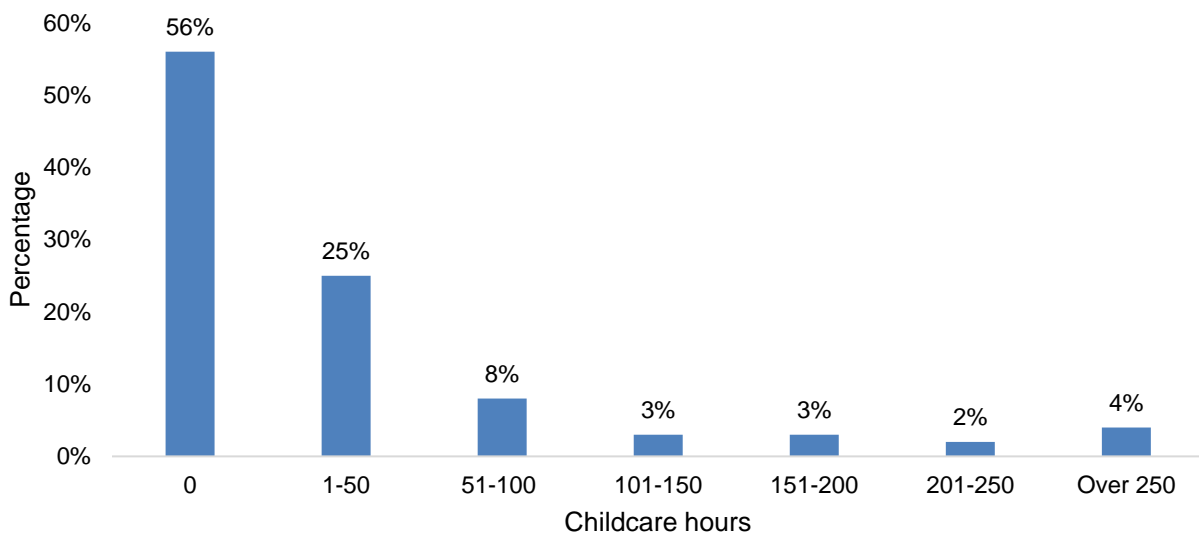


(n=277, 273)

Use of holiday childcare

The majority of parents (56% of all parents, 50% of parents of at least one SEND child, and 55% of ethnically diverse respondents) did not use childcare in the school holidays (Figure 12), but a quarter used 1 to 50 hours of childcare, 8% used 51 to 100 hours of childcare and 12% used over 100 hours of childcare.

Figure 12. Holiday childcare hours used



(n=225)

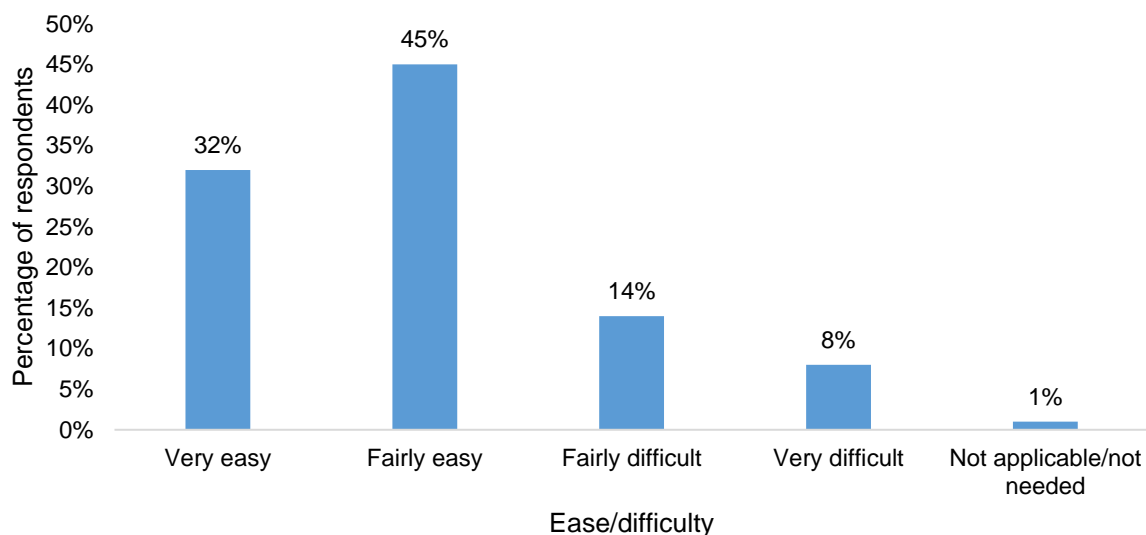
Experience of finding childcare

We asked respondents to our parent survey how easy or difficult it was to find childcare: very easy, fairly easy, fairly difficult or very difficult. The majority (77%) found it very or fairly easy, while 22% found it fairly or very difficult (Figure 13).

Ethnically diverse parents and parents of SEND children, compared to other parents, gave similar answers, though were a little more likely to find finding childcare difficult.

Those answering very difficult or fairly difficult had an opportunity to explain, and 63 wrote comments. Respondents most frequently spoke about a lack of places and availability at the times they needed, particularly wraparound care. They also commented on difficulties in finding information and on the high cost of childcare. Some reported difficulties in finding appropriate childcare for children with SEND. Some commented on the impact of Covid-19, such as restrictions on the number of children in settings.

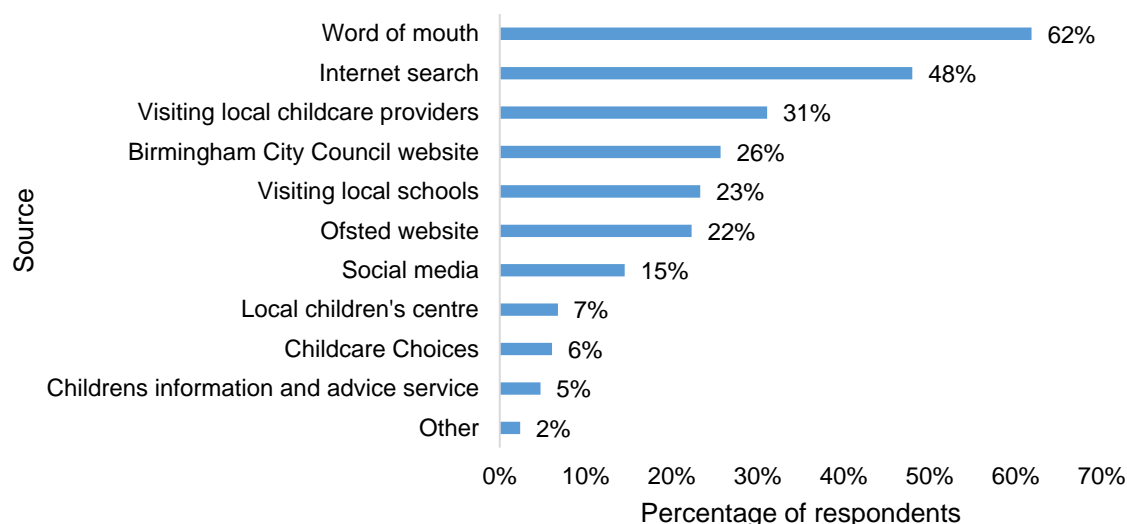
Figure 13. How easy or difficult it was to find childcare



(n=311)

We asked respondents where they found out about childcare. The majority (62%) reported that they found out through word of mouth (Figure 14).

Figure 14. Where respondents found out about childcare

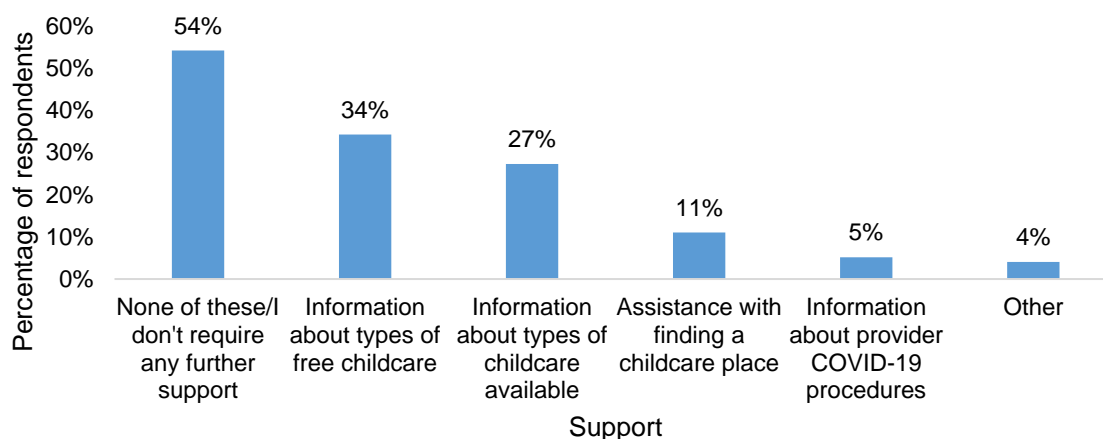


(n=296)

Other sources, parents explained in written comments, included 'driving around', particular websites, and through schools.

The majority of respondents (54%) reported that they did not require any further support to access childcare (Figure 15). Just over a third (34%) reported that they wanted more information about types of free formal childcare and just over a quarter (27%) wanted more information about the types of childcare available to them.

Figure 15. Support needed to access childcare



(n=271)

Finding information

Our parent interviewees found information about childcare online, through word of mouth, from school, from college and through speaking to childcare staff. Online sources mentioned were school websites, Google searches, www.childcare.co.uk and Facebook. Parents were looking for information on cost, hours, Ofsted ratings, what the settings provide, what is included in the price and how EEE can be utilised. Some parents reported that they found all the information they needed, but others reported that it was hard to find

information. Some highlighted that there was no centralised data base with information about childcare providers in the area. One parent highlighted that children miss out when their parents lack information.

“I went online mainly. The schools have got links on their website but they weren’t very good, so I just mainly Googled childcare providers around to see what childminders come up and any childcare settings.” – Parent

Securing childcare

The majority of parents interviewed reported difficulties in securing childcare. Challenges included a lack of choice, availability at the hours needed, and access, for example, to wraparound care and childminders. One parent described a setting shutting down at short notice leaving her needing alternative childcare. Another parent described it as a long process involving the completion of many documents.

Some described finding suitable childcare as hard on parents. One parent, who reported that the first nursery she had used was not meeting her child’s basic needs, explained that the experience had had a negative impact on her mental health. Some reported that being a single parent or not having extended family nearby made it particularly difficult to find childcare to meet their needs. Less often, parents we interviewed described the process of finding childcare as easy and straight-forward.

“When you’re looking at nurseries it’s fine... But finding a childminder it was really difficult, it was so difficult. So it’s either looking in the playground and if you see someone with a load of children with them, just approaching them and asking them if they’re a childminder. I remember asking in the school office but they didn’t really have any... There’s this website called childcare.co.uk I think, I have looked on that. But it’s really just kind of speaking to people and trying to find out if they recommend anyone or if they know anyone who picks up from school. So it was really word of mouth, but you have to go out there and get yourself out there and be asking people.” – Parent

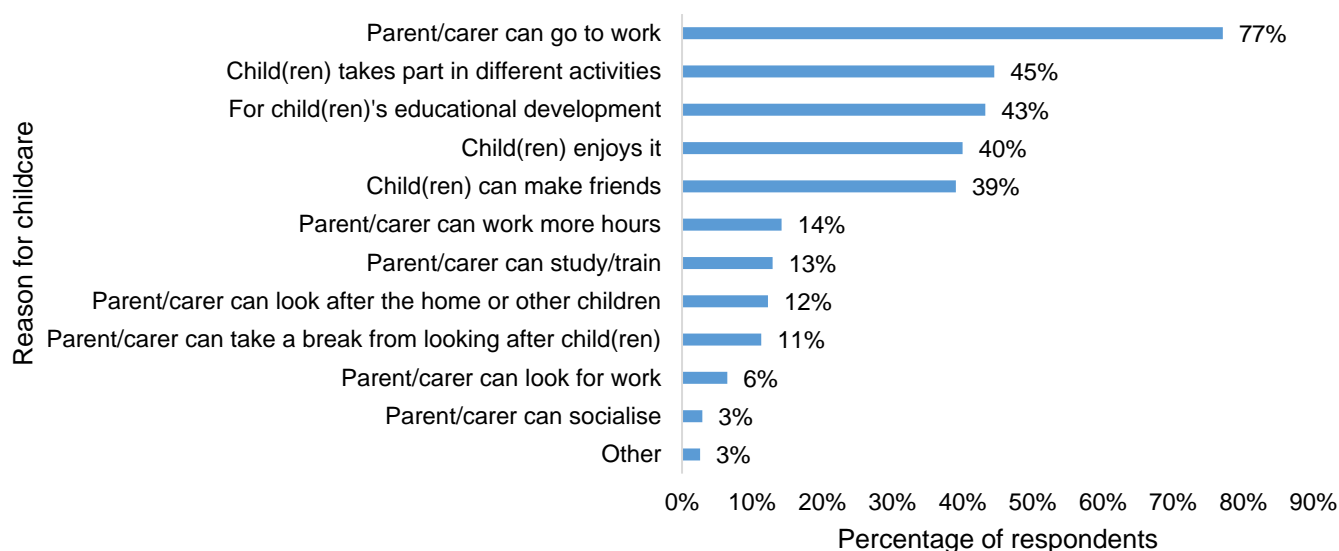
Many parents had used multiple settings before finding one that suited their family’s needs. One parent described trying four or five different settings for her son. She described nursery staff not giving him the time he needed or catering to his needs. Because of this experience, she was considering keeping her children at home. She did eventually find a childminder for her son who she was very happy with, so securing childcare for her younger child was straightforward.

Reasons for using childcare

In our survey, the most common reason parents/carers gave for using childcare was so they could go to work (77%) (Figure 16). This was 78% for ethnically diverse respondents, but lower at 59% for respondents with at least one SEND child.

Respondents could give more than one answer. Parents/carers also wanted their children to take part in different activities (45%) and develop educationally (43%). Forty percent answered that their children enjoy it and 39% answered so that their children can make friends.

Figure 16. Reasons for using childcare



The most common reason for using childcare among our interviewees was to allow parents to work, and in some cases study. One parent spoke about not being able to study in the country she grew up in, so she needed childcare to allow her to study English. Parents and carers also mentioned a number of benefits for the children - they enjoy it, do different activities, mix with other children and learn new things. Some parents spoke about the benefits to their children's development and childcare helping with the transition to school. Some parents and carers also spoke of the benefits for themselves, such as having a break from their children, having time for themselves, and allowing them to attend appointments.

“If she doesn't have nursery, I can't go to college, because I don't have any family here, my husband is working. I would like to prepare myself to speak English well and then find [a] good job, for that I am studying now.” – Parent

Some parents and carers of children with SEND spoke about using childcare because they needed help with their child's additional needs. For some, the child needed the input of Early Years professionals or needed the extra stimulation provided in childcare settings.

Reasons for not using as much childcare as wanted

Just over half of respondents to our parent survey (51%) wanted to use more childcare. For parents of at least one SEND child, this was 57%. For ethnically diverse parents, it was 58%. We asked those who wanted to use more childcare why they were not using as much childcare as they would like. The vast majority (81%) answered that it was too expensive (Figure 17).

Other reasons, 22 parents explained in written comments, included difficulties of eligibility or access to free hours, other practical barriers like holiday clubs filling up fast, and having to give a term's notice to change, add or remove days. Comments included:

“my son is with family members as the school has not reinstated a childcare facility as of yet” – Parent

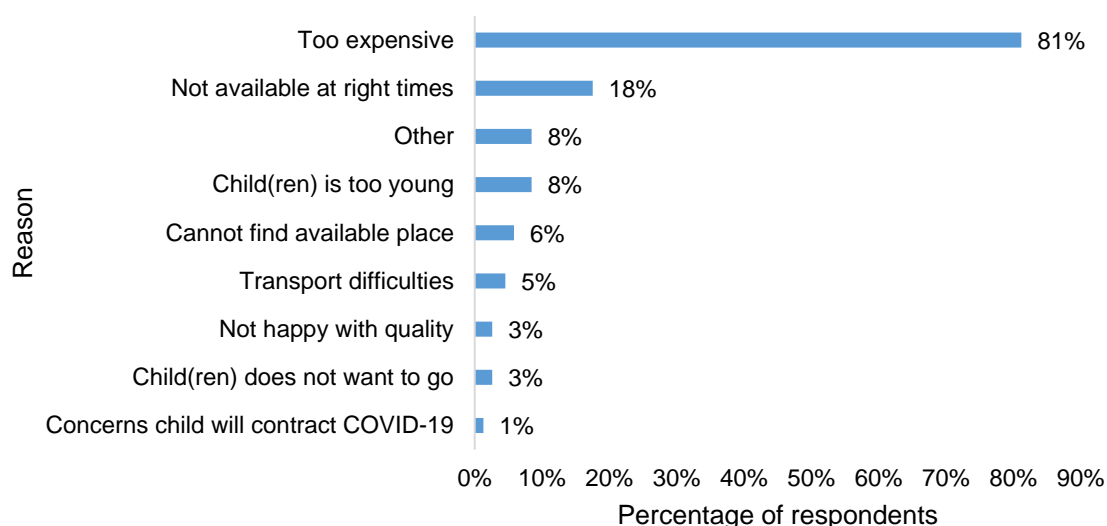
“my child is too old at 16 for most childcare, he has severe learning disabilities” – Parent

“only 15 hours given if you are unemployed. It’s harder to get a job if you are black. this is back door racial discrimination” – Parent

In the focus group with young people with SEND young people thought that wraparound care (before and after school clubs) should provide a space for neurodiverse children and/or those with SEND to relax. This would help it feel different to what one young person described as the “stressful and overwhelming” school environment and potentially make it more accessible and appealing to these children. Spaces where there is less sensory stimulus, such as low levels of lighting and sound, could help to create this downtime:

“There are so many kids that would have gone to after school club but found it too overwhelming for the sensory side of it, or just the accessibility like the room ... it was not wheelchair accessible.” – Young person

Figure 17. Reasons for not using more childcare



(n=154)

As in our survey, some parents mentioned in interviews that they would like to use childcare more than they do currently. Cost was the main barrier for parents. Some parents also mentioned particular settings not being open at the hours they needed them.

“There’s certain things that Early Years providers know about children’s development, so I want them to go to nursery, but I genuinely can’t afford it. It would cost me £2,400 a month, I’ve worked out, if I put them in nursery, which I’m sorry, but I don’t have that kind of money.” – Parent

“[The children] even want to go [to after school club] for five days! I just can’t afford it.” – Parent

“I didn’t choose to not use childcare, but I’m on low income so I can’t afford it.” – Parent

Cost and affordability was also referenced at the focus group with young people with SEND. The group of young people thought affordable (and even free) wraparound care was essential to avoid disproportionately negatively affecting single parents and parents and carers with children with SEND:

“...it is those single parents that need the extra boost [of financial support] to be able to have that time to get into work, and work to bring in that income.” – Young person 4

The quality of childcare

Ofsted is responsible for rating the quality of all early education and childcare providers. As a rule, all childcare providers must register with and be inspected by Ofsted, who gives them an overall grade for the quality of their provision, but not all of school-age provision is registered with Ofsted, such as some art or sports clubs. Childminders and private and voluntary providers are on the Early Years Register, and schools and standalone maintained nursery schools are on the Schools register. Nursery classes in independent schools do not generally have an Ofsted grade. The grades for both registers are equivalent. Schools with nurseries have an overall inspection grade for the whole school and most also have a separate early years grade. Both schools and early years providers have four possible Ofsted grades: ‘outstanding’, ‘good’, ‘requires improvement’, and ‘inadequate’. Providers still awaiting their first full inspection are excluded from our calculation. The expectation is that all provision should be as far as possible delivered by providers who have achieved an overall rating of ‘outstanding’ or ‘good’.

The majority of Birmingham’s childcare providers are rated good or outstanding (93%) (Table 15). Ofsted’s inspections have been affected by the pandemic and ratings have only changed marginally since 2019. The national and regional rates of good and outstanding childcare providers in 2021 are higher – 96% ([Ofsted, 2021](#)). Sutton Coldfield (98%), Selly Oak (96%), and Hall Green (96%) had the highest percentage of providers rated good or outstanding in Birmingham, and Hodge Hill had the lowest (78%).

Table 15. Percentage of all Birmingham providers achieving each Ofsted ratings, 2019 and 2021

Ofsted rating	2019	2021	Percentage point change
Outstanding	17%	16%	-1%
Good	77%	77%	0%
Requires improvement	5%	5%	0%
Inadequate	1%	2%	+1%

Where there are no children on roll or present at the childcare setting, no grades are given against the four key Ofsted judgements. Instead the inspector makes an assessment of the overall quality and standards of the early years provision and provide either a ‘met’ or ‘not met’ assessment. The not met assessment can be given with actions or with enforcement. In the 2019 and 2021 Ofsted inspections, met and not assessments were only given to childminders (n=97 and n=82 respectively). The majority of childminders met the overall quality and standards and this proportion has increased from 2019 to 2021 (Table 16).

Table 16. Percentage of all Birmingham providers achieving each ‘met’ and ‘not met’ Ofsted ratings, 2019 and 2021

Ofsted assessment	2019	2021	Percentage point change
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Met	74%	82%	+7%
Not met	26%	18%	-7%

Of the providers receiving one of the four main Ofsted categories (i.e. with children present/on roll at the time of inspection), the majority were rated as good or outstanding. All nursery schools were rated good or outstanding in 2021 (Table 17).

Table 17. Percentage of providers rated good or outstanding by type, 2021

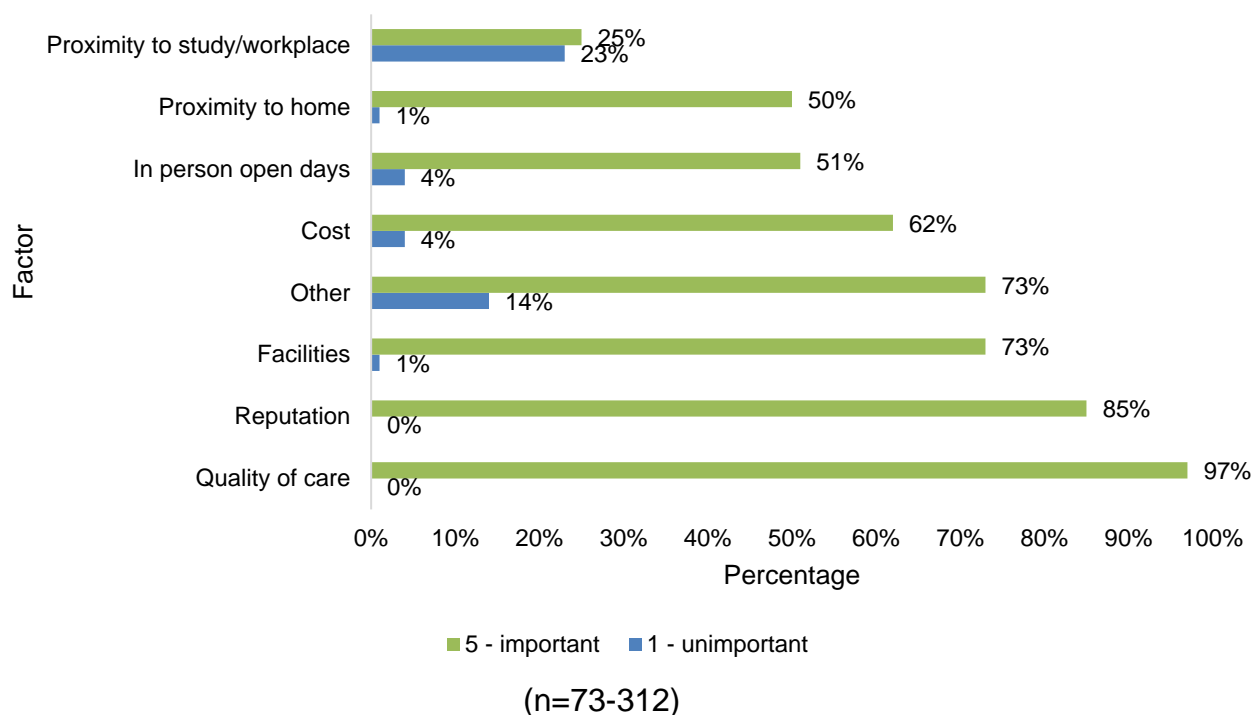
Type of provider	Percentage of providers rated good or outstanding
Childminder	97%
Day nursery	93%
Nursery class	83%
Nursery school	100%

What parents and carers look for in childcare

We asked survey respondents to rate the importance of cost, quality, reputation, proximity to home, proximity to study or workplace, in person open days and initial visits, facilities and 'other' when choosing childcare. They could rate each factor from 1 to 5, with 1 being unimportant and 5 being important. For each of these items, responses ranged from 312 to 73, for 'other' factors (Figure 18).

Nearly all (97%) answered that quality of care was important, grading this factor 5, a mean average of 4.96, the highest of any factor. The majority of respondents also agreed that reputation (4.80), facilities (4.63), other (4.29), cost (4.27) and in person open days (4.11) were important. Half thought proximity to home was important (4.23) and a quarter thought proximity to their place of study or workplace was important (3.09). Among the parents rating the importance of 'other' factors, 56 wrote comments to explain. These included Ofsted ratings, safeguarding, reputation, safety, culture, and staff factors including qualifications, numbers, kindness, experience, and friendliness.

Figure 18. Importance of different factors when choosing childcare



Parents interviewed commented on the location as a factor when looking for childcare. Other logistical factors considered were whether the provider offered the hours needed and whether they did school pick-ups and drop-offs. Staff qualifications and Ofsted ratings were important to some parents. Parents also mentioned the care quality, the comfort of their child, and the cleanliness of the setting. Some parents mentioned trust, reputation, knowing the staff, and feedback from other parents. Others spoke about the environment, size of the group, activities and food offered. Parents also considered the affordability of a setting. One parent reported that when she was looking for childcare she looked at diversity in the setting and explained that it would be concerning to her if she did not see diversity in pupils and school staff.

“[The childcare setting] had to be near home and somewhere that they could do the school pick-ups and someone you trust and you’re happy with what they do.” – Parent

Suitability of childcare

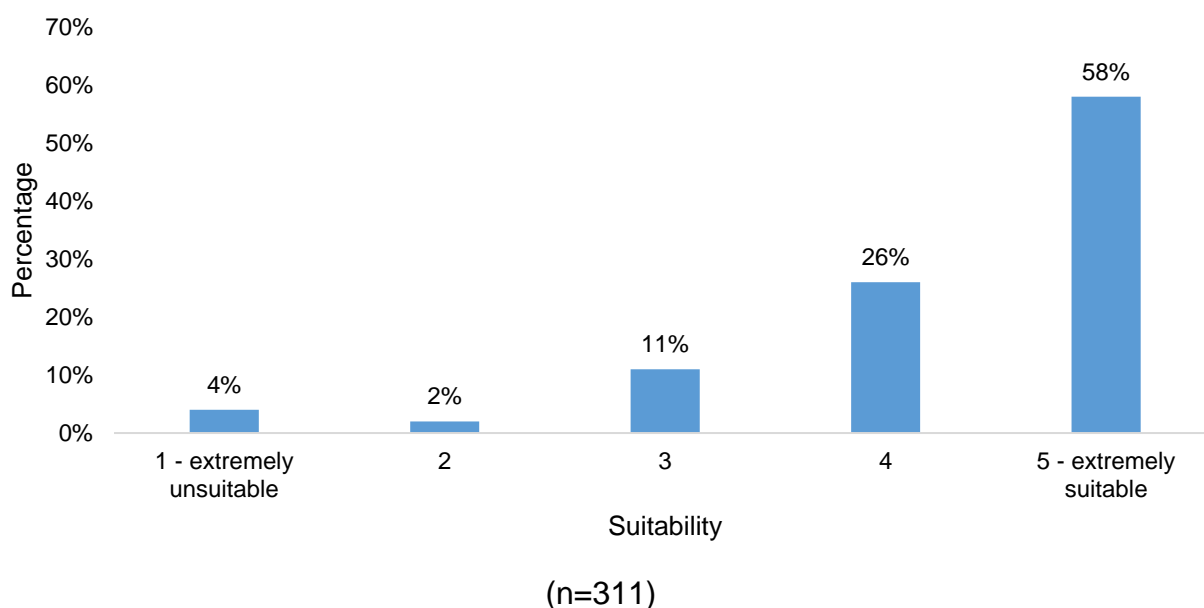
We asked respondents to our parent survey how suitable their current childcare they use was. They could choose from 1 to 5, with 1 being extremely unsuitable and 5 being extremely suitable. The majority (58%) answered that their childcare was extremely suitable (Figure 19). At least three quarters of parents of children in each age group considered their current childcare suitable or very suitable (4 or 5 on the scale).⁶ Three parents of 14 to 18 year olds with SEND considered their childcare extremely suitable (n=2) or extremely unsuitable (n=1). Parents of SEND children also mostly reported that their child care was extremely suitable. Responses from white and ethnically diverse

⁶ Parents could tell us the ages of up to six children receiving childcare. This analysis covers only the first, or only, child.

parents were similar, with ethnically diverse parents a little more likely to consider their childcare extremely suitable.

When parents said their current childcare was not suitable, we asked them for a sentence summarising why this was. In response 48 wrote comments, covering the cost of childcare, a lack of availability at the times needed, issues with EEE (such as there not being enough free hours), poor quality of settings and challenges related to SEND (such as needing specialist provision).

Figure 19. Suitability of current childcare



We analysed perceived suitability by type of childcare. As numbers were small, we considered only the most common childcare types. Formal provision (nurseries and childminders) was considered more suitable than informal provision, with well over half of those using nurseries and childminders considering this extremely suitable (62% to 78%) compared to 39% of those using informal childcare. These numbers cover just those respondents who only used one type of childcare, though this pattern held in the overall sample.

We asked parents how happy they were with how their childcare provider was delivering the childcare: very happy, happy, unhappy, very unhappy, and don't know. Nearly all respondents (91%) were very happy or happy (Figure 20).

Parents who had SEND children or were ethnically diverse responded in broadly the same way as other parents, though were more likely to report being 'happy' rather than 'very happy'.

Some of those who were unhappy explained why in written comments. These included:

"my child has been off twice for 10 days at a time, he's missed out on a lot" – Parent

"Lack information and communication as to what my child is doing in the day, no longer fill out books with meals, naps etc" – Parent

“Not culturally sensitive” – Parent

“Not enough staff” – Parent

“They do not seem to have trained staff to manage children’s behaviour” – Parent

“Unsupportive and inflexible” – Parent

In our focus group with young people with SEND, young people remembered using before and after school clubs at primary school and generally talked fondly of their experiences. They described having a positive and “nurturing” experience, but some noted how they would cluster with their siblings during wraparound care rather than be encouraged to integrate with the whole group. One young person did not feel included. They thought extra activities and warm up games could help, especially early in the morning at the before school club:

*“My primary school was really good with getting everyone to work together, though in activities I did always feel a bit like, I am trying to find the right words, left out in a way.” –
Young person*

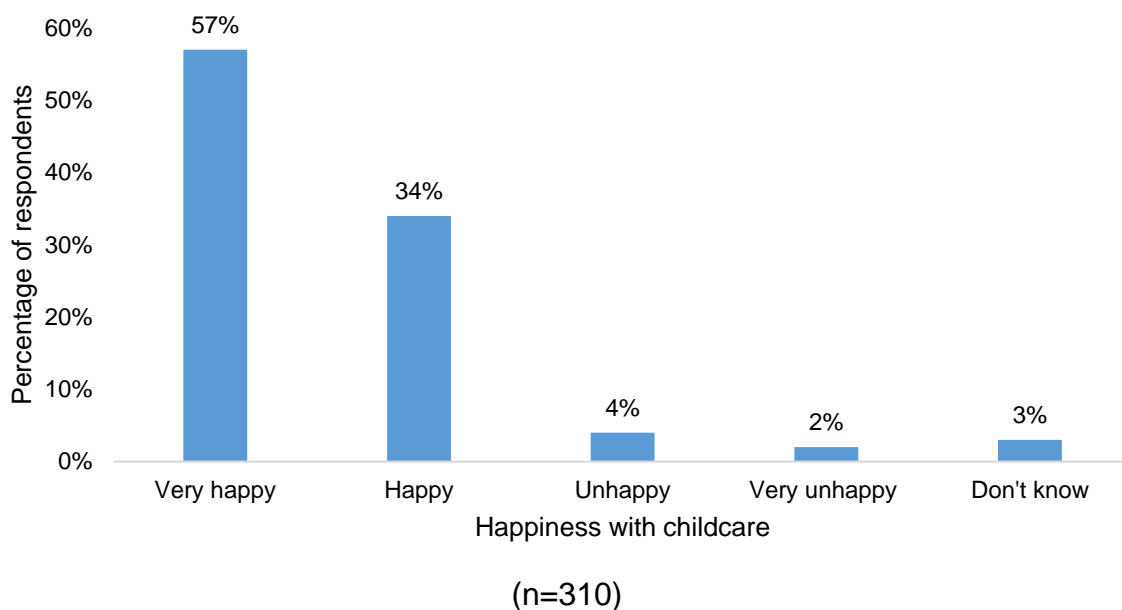
Like some of the parents interviewed, young people at the focus group talked about the importance of trusting wraparound care staff and feeling prepared for what to expect from the care. This is especially important for children with SEND. This may reduce young people’s anxiety about attending. For example, it would be helpful for young people to see the wraparound care setting and read about the staff prior to attending:

“You do not know what the care is going to look like. These experiences as a child can be daunting enough, especially when feeling out of control and in a new situation without parents.” – Young person

The young people commented that it was particularly important for wraparound care staff to be skilled in detecting any unmet needs for children with busy working parents. These children may have less contact with their parents than children who do not use wraparound care. Staff should look out for cues that a child is feeling exhausted, isolated or lonely, for instance:

“they [the staff] need to be a little bit more conscious that there are children that do not get as much support from their parents or time than others” – Young person

Figure 20. Happiness with current childcare provider



The parents we interviewed were generally happy with the childcare they were using currently, but many had used multiple settings before finding somewhere suitable. Some parents reported that there was nothing they did not like or that they would change about their current childcare provider. Some parents mentioned that they liked the location of the setting. Others mentioned the setting's outstanding Ofsted rating and well-trained staff. Some liked the small group sizes.

Flexibility of childcare

Parents tended to like the flexibility of childminders if they were late in picking up children, if they needed childcare last minute, or during holidays. One parent liked that the childminder would do what the parents wanted them to do, such as homework. However, parents did mention that there was no backup if the childminder was unwell or went on holiday, which meant that they sometimes had to find alternative childcare at short notice. Some parents who used other types of childcare settings described less flexibility if they were late.

Communication with childcare settings

Parents commented on good communication with the childcare settings and positive relationships with staff. One parent stated that the childminder was almost like family and had checked in on her child when he was unwell. Other parents spoke of a sense of family and the family orientation of the nurseries they used. One parent commented on the trust they had in the staff at their child's playgroup.

"If I ever have questions I can literally chat with the carer of my child, the teacher should I say, and then I'll get a reply either when I pick up my child or they will reply on the app.

It's very interactive and I do have full confidence in the nursery because of that." –

Parent

Benefits to children of childcare

Parents spoke about the happiness of their children with the childcare. Most parents spoke about how much their children liked going. Parents mentioned that settings had lots of

activities to entertain and engage their children, like Taekwondo classes, football and forest school. Some spoke of the high level of care that their children received.

“It’s just such a delight to see that they want to go, they’re happy to go. It makes me feel so happy.” – Parent

“Whenever I drop him off to the childcare he’s so eager to get inside the room. When he goes in and says ‘bye bye’ he wouldn’t even mind me. He’s happy to see his friends and teachers.” – Parent

Some parents spoke of social development benefits, such as childcare giving their children the opportunity to interact with other children. Some parents mentioned skill development. Two parents who did not speak English to their children at home said that childcare had supported their children’s English language development. Some also mentioned that childcare made the transition to school easier.

“When they are going to school or nursery, they are going to prepare their future, they are preparing their future. If you are at home, you can’t learn anything. You’re just going to learn about your family, nothing else. But if you are going [to] college or nursery, you will learn many things and understand life.” – Parent

Support with SEND

Parents and carers of children with SEND we interviewed generally commented on how childcare had benefited their child’s development. They mentioned behaviour improvement, speech and language development, and sleep routine improvement.

One parent explained that the playgroup built a SEN package for his child which has continued at school. He felt it was important that it was picked up on during the early stages. Another parent described the nursery as having the children’s interests at heart and being development-centred. A foster carer explained that nursery staff offered emotional support by reassuring them that they were doing the right things.

“[One nursery was] so brilliant and supportive and they had experience, even though they might not have had loads of experience with autistic children, they had more than we did. So they were a massive help and support to us. It changed her completely. It made a massive difference to her.” – Foster Carer

However, one parent had issues with staff not understanding her children’s additional needs. They offered no specialist support. One staff member studying autism had a better understanding of her children, but had left the setting. There was a consistently high turnover of staff. She also mentioned issues of bullying. She suggested a better mix of skills, including new and experienced staff, would be beneficial.

Variation in suitability between different childcare settings for children with SEND

Some parents changed childcare settings as previous settings had been unsuitable, but most had found suitable childcare eventually. One foster carer had used three different nurseries which had varied in suitability for her child with severe autism. The first one had been supportive and a big help, but didn’t have a long-term space. The second nursery had been unsuitable. The foster carers themselves had to pay for one-to-one support for the child, which was over £100 per day initially. Yet when the nursery was short-staffed, they used the one-to-one support to look after other children and sent their child home. The foster carer described having to fight to get council and fostering agency funding to

cover the costs, which they did eventually. She described the third nursery as “brilliant.” She reported that the SENCo had knowledge of what might help her child and what to expect. She stated that the nursery was more helpful than social workers.

Despite problems with the second nursery, the child was generally happy at all three nurseries, excited to go every day, and her stability had increased. The foster carer described going to nursery as “the best thing for her.” The child has recently moved to a special school but there was no provision for holiday, leaving a big gap for the family. The lack of provision in school holidays was mentioned by another parent.

Another parent tried two nurseries and a childminder, before finding a suitable nursery school for her child with delayed speech. She reported that her child was not happy at the childminder and the first two nurseries did not care about his additional needs, but that the current nursery school has a designated SENCo and her child’s speech had improved.

Perspectives of children

We spoke with 6 children about their experience of childcare. The children were between 3 and 11 years old (average age 7 years). The interviews were informal discussions with their parent present. The children and their parents were given information about the research before consenting to take part. Three children were looked after by a childminder, 2 children used to attend a playgroup (but could not remember it very well so the interviews were very brief) and 1 child went to wraparound care before and after school.

All 6 children generally liked or remembered enjoying their childcare setting. The 3 children who were looked after by a childminder really enjoyed their childcare. Some children spoke about creative activities, playing with toys and playing outside:

“I like to do colouring and making things.” – Child, age 4

Most children mentioned having friends at their childcare, for example:

“I like to play with my friend there ...there are 3 other people, [other children’s names]. [One child] I get along with really well and [my sister] gets along with her as well. Her sister is [name] and we get along with her too” – Child, age 8

One child (age 11) enjoyed wraparound care when there was a particular staff member present. She had a good relationship with this staff member and for her it was important to her to trust the staff running the wraparound care:

“they [wraparound care] bring in people [other staff] from the nursery that I don’t know very well and those people come and pick me up [from school] and I don’t know them very well so I don’t know whether I can trust them” Child, age 11

This child had experienced staff who would “yell and scream” and understandably did not like this approach. Also she thought the wraparound care had a lack of outdoor facilities and she would have liked to have more children there similar age to her rather than just “little kids”.

Trusting staff was also an important factor for the young people with SEND who attended the focus group. Young people wanted to feel prepared for what the childcare setting was going to be like, including who the staff were.

Affordability of childcare

The overall hourly and weekly rates charged for childcare in Birmingham have risen since 2019, by 6% and 8% respectively (Table 18). In England average price rises for part-time nursery care have ranged from 4% to 5% since 2020 ([CFC, 2021](#)). Hourly and weekly rates have risen in all types of providers in Birmingham. The hourly rates of pre-school playgroups and the weekly rates of childminders have risen the most. The hourly rates of day nurseries and weekly rates of NUIS have risen the least.

In reality prices paid by parents and carers may be higher or lower than those shown below. Prices may vary based on the number of hours a family uses, or include discounts for sibling groups. Additional services such as lunch are not included in these prices.

Table 18. Hourly and weekly rates of childcare in Birmingham by provider type, 2019 and 2021

Provider type	Average (mean) hourly rate – 2019	Average (mean) hourly rate - 2021	Percentage change	Average (mean) weekly rate – 2019	Average (mean) weekly rate – 2021	Percentage change
Childminder	£4.80	£5.12	+7%	£168.78	£191.33	+13%
Day nursery	£6.04	£6.34	+5%	£197.41	£211.54	+7%
Nursery Unit of Independent School	N/A	N/A	N/A	£223.75	£233.67	+4%
Pre-school playgroup	£4.25	£4.66	+10%	£108.12	£115.56	+7%
Overall	£5.40	£5.75	+6%	£189.03	£204.09	+8%

The costs in Table 18

Table 18 are not adjusted for inflation. Between 2019 and 2021 inflation averaged 2.8% a year (calculated according to the ONS composite price index (CPI) ([Bank of England, 2022](#))). The overall average hourly rate for childcare adjusted for inflation is £5.68 according to the cost in 2019. This means that in real terms (adjusted for inflation) the hourly cost of childcare increased by 1% or less for childminders and day nurseries, and by 4% for pre-school playgroups between 2019 and 2021. In terms of weekly rates, when adjusted for inflation the cost of nursery units in independent schools fell by 1%, with a 1% increase for day nurseries and pre-school playgroups and a 7% increase in childminder costs. These changes will be felt differently depending on family income, and inflation, and vary by sector. This is complicated further when we consider the role of the pandemic in terms of furlough and lost hours. We therefore asked parents directly about the affordability of their childcare in the interviews and survey, detailed below.

Figure 21. Average hourly cost of childcare by provider type, 2019 and 2021

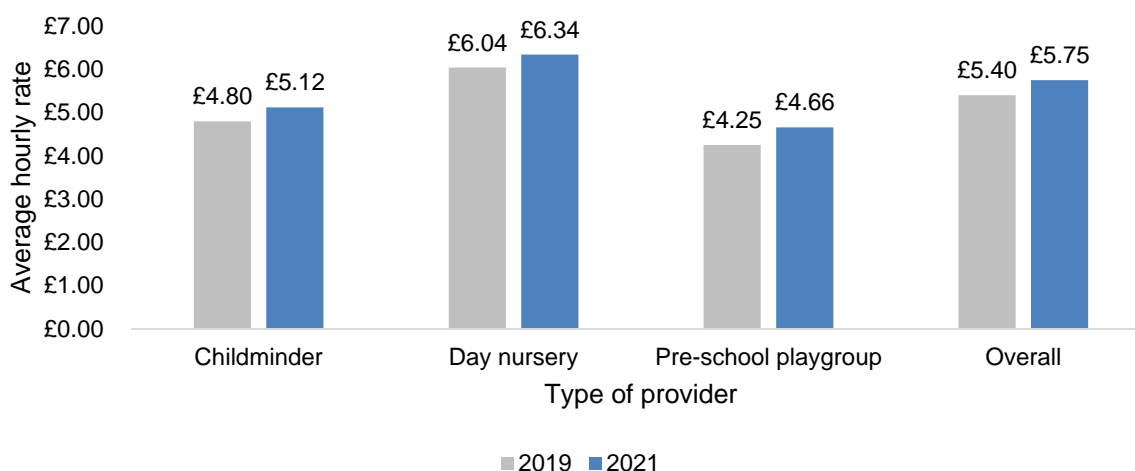
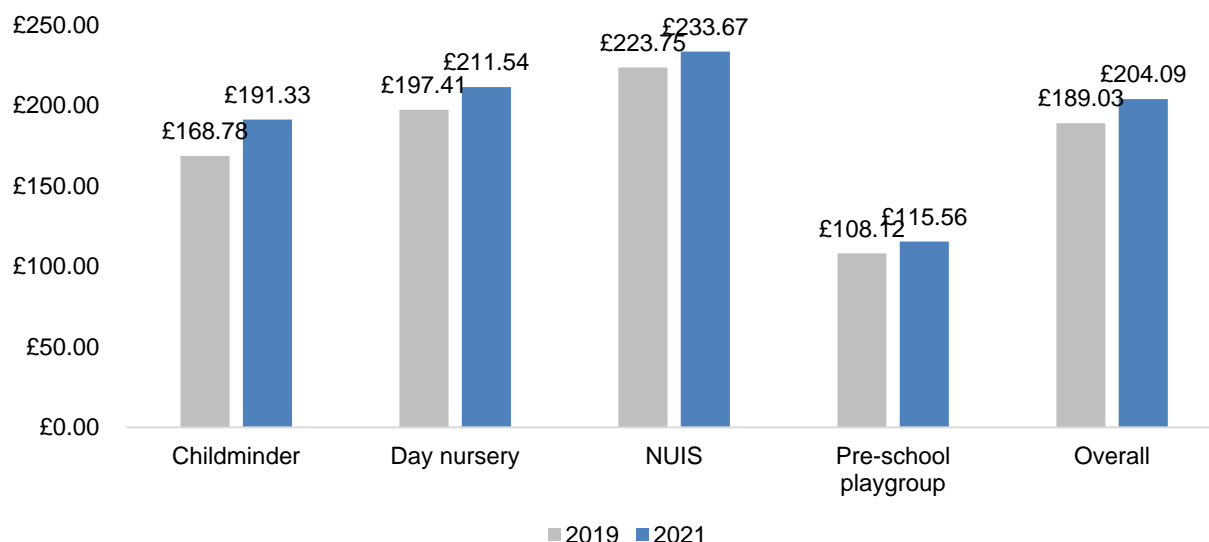


Figure 22. Average weekly cost of childcare by provider type, 2019 and 2021



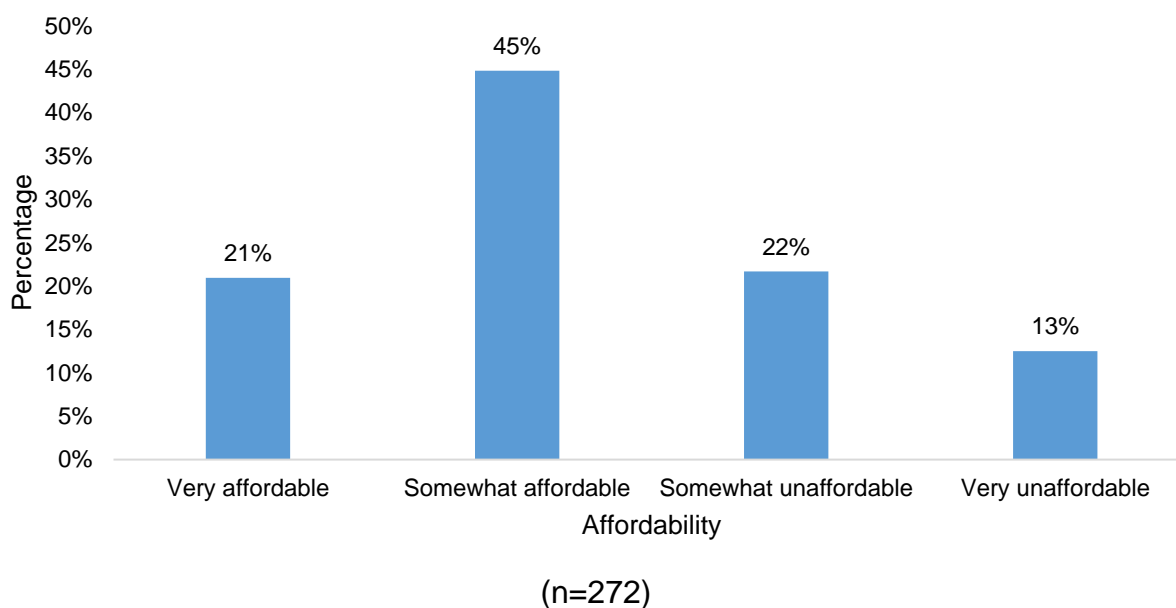
Average weekly nursery prices are higher in Birmingham than the national average. In Great Britain the average weekly price of a part-time nursery place for a child under 2 is £137.69. In England, if parents of 3 and 4 year olds are eligible for 30 hours of funded childcare and want to use an extra 20 hours to take them up to a full time place, the average weekly nursery price is £101.58 ([CFC, 2021](#)).

In 2021 the most expensive average hourly rate in Birmingham was in Ladywood (£6.79) and the most expensive average weekly rate was in Edgbaston (£246.40). The cheapest average hourly rate was in Selly Oak (£4.80) and the cheapest average weekly rate was in Hodge Hill (£176.06).

Affordability

When we asked in our survey of parents about the affordability of childcare, the most common answer was 'somewhat affordable' (45%) (Figure 23). Thirty-five percent of respondents thought that childcare was either somewhat or very unaffordable.

Figure 23. Affordability of childcare



Most parents we interviewed spoke about the high costs of childcare being challenging. Some parents who were using EEE reported that childcare was still expensive as they had to pay for extra hours or childcare for other children. Childcare costs required some parents to make changes in other areas of their lives.

Impact of childcare costs on parents' work

Childcare costs limited some parents' ability to work. Some parents changed working patterns as they couldn't afford childcare every day. One parent said she would like to work full-time but did not because she could not afford childcare. Another parent did not know how she would afford childcare costs if she worked full-time. She believes she'll have to move closer to her elderly parents so that they can offer childcare support. One parent questioned whether it was worth working when the cost of childcare is so high. Another parent spoke about seeing people give up work as they're spending all their earnings on childcare.

"I would definitely work full-time, I should and I'm qualified, but I can't work because of childcare." – Parent

One parent was working seven days a week across two jobs in order to pay for childcare. One parent spoke about the financial burden of childcare, but explained it was a necessity as he needed to work and childcare allowed him to do this. He explained that it was not easy for a migrant from Africa trying to integrate. Another parent would like her two youngest children to be in nursery, but she could not afford it, so relied on childcare from family while she is working.

"I think it should be a priority that there is affordable and/or free childcare for children of nursery age. You can't just take 3 years out of your career. You still need to work, because you can't guarantee that there's going to be a job waiting for you." – Parent

Government support

Two parents found the process of claiming back childcare costs too long and complicated so decided not to use it. One parent could not afford to wait for two months for the money

to be reimbursed. One parent suggested that someone should inform parents of the childcare support they are entitled to when applying for Universal Credit as no one had told her.

Several parents thought the government should do more to support parents with childcare costs. One parent reported that the income threshold for free childcare for 2 year olds is too low. Another parent suggested making all childcare tax and national insurance free. Some parents also suggested more targeted support for low income families.

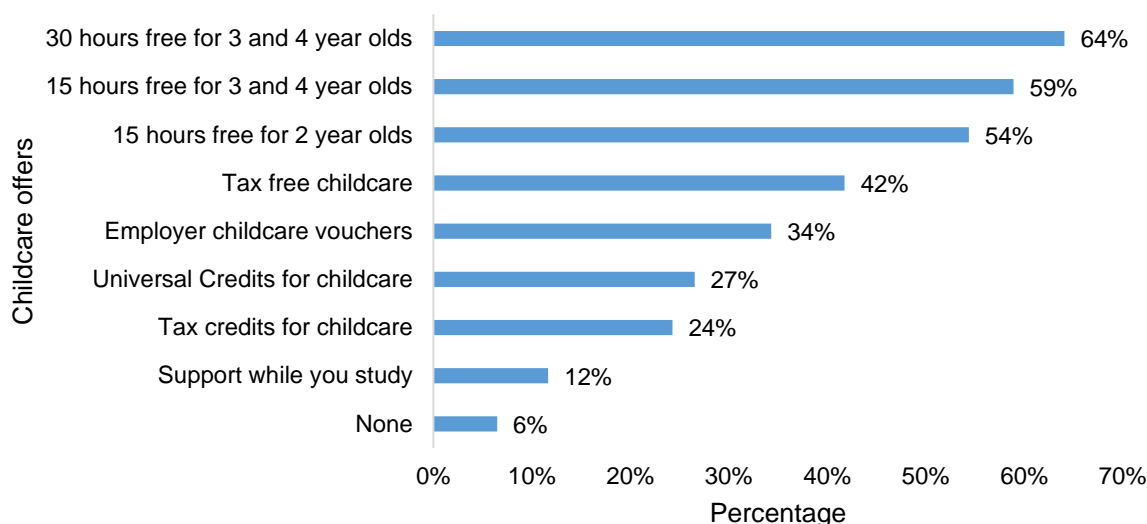
A parent who had previously been an asylum seeker explained that the financial support asylum seekers receive from the government is not enough for basics, let alone childcare. She suggested free childcare or support for childcare should be provided to asylum seekers.

Awareness and uptake of financial support for childcare

The majority of respondents to our parent survey were aware of the free hours for 2, 3 and 4 year olds, although substantial minorities did not know about these free entitlements (Figure 24). It is concerning that 6% of respondents were not aware of any help with childcare costs, especially in this self-selecting sample, who may be more engaged with childcare issues than the average Birmingham parent.

Compared to other parents, parents of SEND children were generally less aware of the entitlements available, the biggest difference relating to childcare vouchers, which only 10% were aware of (3/29). Tax free childcare also saw a large difference with 21% of SEND parents aware, compared to 43% of other parents. Differences between white and ethnically diverse parents were more modest, with white parents being, in particular, somewhat less likely to be aware of tax free childcare and childcare vouchers.

Figure 24. Awareness of types of help with childcare costs

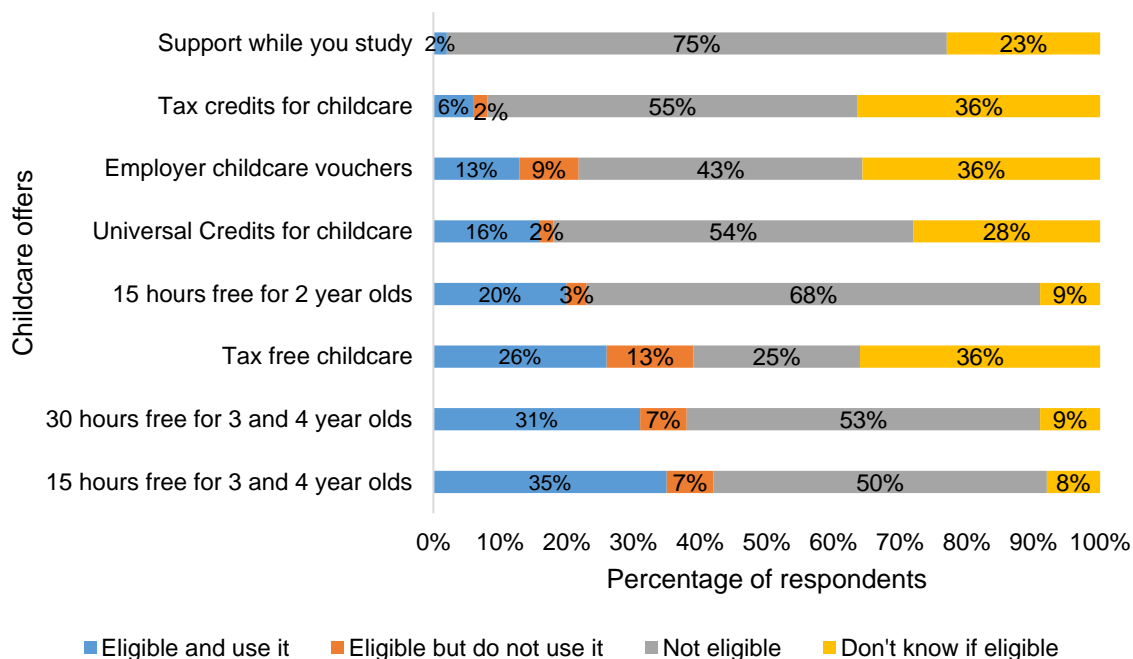


(n=309)

We asked respondents if they used any childcare offers, and gave the options 'eligible and use it', 'eligible but do not use it', 'not eligible' and 'don't know if eligible'. They were most likely to use the free entitlements for 3 and 4 year olds (Figure 25). Small percentages of respondents were eligible but did not use all childcare offers, other than

support while you study. This answer was highest in response to tax free childcare (13%). Over a third of respondents (36%) didn't know if they were eligible for tax free childcare, employer childcare vouchers and tax credits for childcare.

Figure 25. Eligibility and use of childcare offers



(n=209-238)

We asked those who were eligible but did not use childcare offers why this was. Among the 42 who wrote comments were parents unsure how it worked or how to apply, or who had not yet got round to sorting out the paperwork. One commented: “Too complex to look into - no time!”

Three parents commented on interactions with Universal Credit, for example, “because it takes away your Universal Credit it’s either one or the other.”

Other practical barriers included the fact that fees apply during half-term, “current set up at the school’s after school club does not allow for use of tax free scheme”, and a childminder not being Ofsted registered, meaning the cost could not be claimed. One parent reported that their nursery manager did not inform them of the deadline to apply, meaning their child missed out.

More positively, three parents found it better financially to use company childcare vouchers instead of free hours.

Early education entitlements (EEE)

As noted previously, some children are entitled to free childcare, funded by the government. These entitlements are for 38 weeks per year and include:

- all children aged 3 and 4 are entitled to 15 hours per week until they start reception class in school;

- children aged 3 and 4 where both parents are working, or from lone parent families where that parent is working, are entitled to 30 hours per week until they start reception class in school;
- children aged 2 whose families receive certain benefits (including low income families in receipt of in-work benefits), or those who meet additional non-economic criteria, are entitled to 15 hours per week. Nationally, about 40% of 2 year olds are entitled to this offer, but the proportion varies by area.

Parents do not have to use all the hours of their funded entitlement. They may choose to split them between providers. With the agreement of their provider, parents may also spread them across the year – for example, rather than taking 15 hours for 38 weeks a year they could take just under 12 hours for 48 weeks a year.

Populations eligible for Free Early Years Education

Legislation currently requires the council to make available sufficient free early education places offering 570 hours a year over no fewer than 38 weeks of the year for every eligible 2, 3 and 4 year old child in Birmingham. From September 2017 the council has also been required to make available sufficient early education places offering 1,140 hours a year over no fewer than 38 weeks of the year for every eligible 3 and 4 year old. There are 3 types of free funded places:

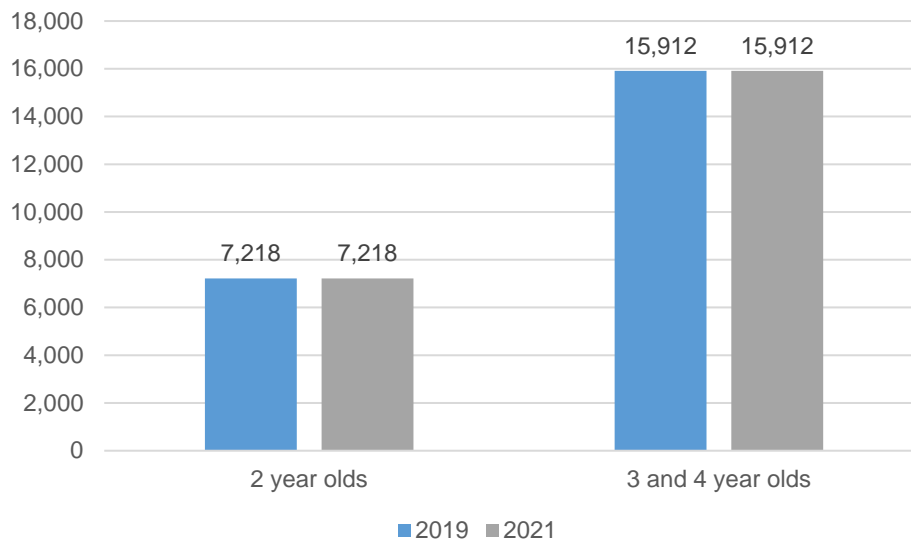
- Universal entitlement for three and four year olds: for children from the term after their third birthday, for 570 hours a year.
- Targeted entitlement for disadvantaged 2 year olds: 570 hours per year for children from the term after their second birthday, if their parents meet certain low-income criteria, or if they meet criteria relating to special educational needs and disabilities, or being in the care of a local council.
- Targeted entitlement for three year old children of working parents: 1,140 hours per year for children from the term after their third birthday, if their parents meet certain employment criteria.

The approximate numbers of children eligible for each of the types of Early Years Education are shown in Table 19, below. The figures are based on known populations where available. While there has been a 6.6% decrease in the under-fives population in Birmingham (from 2018/19 to 2020/21), NHS under 5s list, May 2021), the number of children eligible for EEE has fallen by 10.5%.

Table 19. Children eligible for Early Education Entitlements in Birmingham by cohort and year, Autumn 2019 and Autumn 2021

Cohort	Number eligible in Autumn 2019	Number eligible in Autumn 2021
Eligible 2 year olds	8,256	7,218
Eligible 3 & 4 year olds	17,595	15,912
Total	25,851	23,130

Figure 26. Children eligible for EEE by cohort and year, 2019 and 2021



(n=46,260)

Providers registered for EEE by type

As of August 2021 there were 692 PVI providers and 204 schools offering Early Education Entitlement (EEE) in Birmingham, down 2% overall on 2019 Table 20. The number of childminders, pre-school playgroups and schools offering EEE have fallen, but day nurseries and NUIS have risen.

Table 20. Number of providers registered for EEE in Birmingham by type, 2019 and 2021

Type of provider registered for EEE	2019	2021	Rise/fall	Percentage change
Childminder	340	318	-22	-6%
Day nursery	323	328	5	+2%
Nursery Unit of Independent School	8	9	1	+13%
Pre-school playgroup	36	33	-3	-8%
Schools	207	204	-3	-1%
Other	4	4	0	0%
Total	918	896	-22	-2%

As of August 2021, the number of PVI providers registered to provide EEE varied between 46 and 85, district to district (providers in August 2019 (52).

Table 21). Selly Oak was the district with the highest number (85), similar to August 2019 (84). On the other hand, Erdington only had 46, the lowest number and a slight decrease on its number of providers in August 2019 (52).

Table 21. Number of PVI providers registered for EEE by type and district of Birmingham, August 2021

District	Childminder	Day Nursery	Nursery Unit of Independent School	Pre-School Playgroup	Other	Total
Selly Oak	60	19	0	5	1	85
Hall Green	34	40	2	4	0	80
Sutton Coldfield	40	30	2	7	0	79
Ladywood	20	48	2	3	1	74
Perry Barr	34	35	0	2	0	71
Yardley	39	27	0	5	0	71
Edgbaston	22	38	3	3	1	67
Northfield	34	27	0	2	0	63
Hodge Hill	16	38	0	2	0	56
Erdington	19	26	0	0	1	46
Total	318	328	9	33	4	692

On the whole, most districts have seen a slight fall in the number of PVI providers registered for EEE. Erdington sees the biggest fall, with a 12% drop. However, some districts have seen a rise, for example Ladywood now has 6 more PVI providers registered for EEE.

Table 22. Number of PVI providers registered for EEE by district of Birmingham, 2019 and 2021

District	Total PVI providers registered for EEE, 2019	Total PVI providers registered for EEE, 2021	Rise/fall	Percentage change
Edgbaston	72	67	-5	-7%
Erdington	52	46	-6	-12%
Hall Green	84	80	-4	-5%
Hodge Hill	59	56	-3	-5%
Ladywood	68	74	+6	+9%
Northfield	67	63	-4	-6%
Perry Barr	72	71	-1	-1%
Selly Oak	84	85	1	+1%
Sutton Coldfield	80	79	-1	-1%
Yardley	73	71	-2	-3%
Total	711	692	-19	-3%

In total, as of August 2021, there were 204 schools providing EEE places, and this is only a slight drop from 207 schools in 2019. Ladywood also has the highest number of schools providing EEE (34), while Edgbaston and Selly Oak have the least (both 10).

Table 23. Number of schools registered for EEE by type and district of Birmingham, August 2021

District	Nursery class	Nursery school	Special school	Total
Edgbaston	8	2	0	10
Erdington	16	4	2	22
Hall Green	22	2	1	25
Hodge Hill	23	3	1	27
Ladywood	28	4	2	34
Northfield	13	5	2	20
Perry Barr	18	2	2	22
Selly Oak	11	3	1	15
Sutton Coldfield	8	0	2	10
Yardley	16	2	1	19

Total	163	27	14	204
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Take up of EEE

There has been overall stability in the percentage of eligible 3 and 4 year olds accessing EEE from Autumn 2019 to Autumn 2021 (89%) (Table 24), while there has been a small rise in 2 year old take up from 65% to 66%. The wards with the highest take up for 2 year old places in Birmingham were Sutton Wylde Green with 300% (3 out of 1 eligible child), Northfield with 117% (27 out of 23 eligible children) and Sutton Trinity with 100% (6 out of 6 eligible children). Sutton Mere Green had the lowest with 39%. Northfield had a 102% take up for 3 and 4 year old places (100 out of 98 eligible children); the lowest take up was 65% in Hall Green South.

Table 24. Percentage of eligible children accessing EEE by age and year

Term	Percentage of eligible 2 year old children accessing EEE	Percentage of eligible 3 and 4 year old children accessing EEE
Summer 2019	58%	87%
Autumn 2019	65%	89%
Spring 2020	59%	87%
Summer 2020	n/a	n/a
Autumn 2020	52%	84%
Spring 2021	49%	82%
Summer 2021	54%	83%
Autumn 2021	66%	89%
Spring 2022	62%	88%

The proportion of children with SEND who accessed EEE has seen a small increase. In summer 2019, 4% of children who accessed 2 year old EEE had SEND, compared to 5% in Autumn 2021. In summer 2019 7% of children who accessed 3-4 year old EEE had SEND, compared to 6% in Autumn 2021.

The number of 3- and 4-year-olds accessing their universal EEE entitlement has fallen, as has the proportion of these children who claim their extended entitled (by 2 percentage point).

Table 25. Numbers of 3 and 4 year olds claiming the extended entitlement

	Autumn 2019	Autumn 2021	Rise/fall
3 and 4 year olds claimed (number)	15660	14,126	-2,153 - 1534
Claiming extended entitlement (number)	4282	3,726	-790 -556
Claiming extended entitlement total (%)	27%	26%	-1%

For details of vacancies in EEE registered settings, including out-of-school and holidays vacancies please see the Vacancies sub-section on page 37.

Transition from 2 year old EEE funded places

Mostly, children receiving 2 year old EEE funded places do not transition to 30 hour funded places for eligible working parents. Birmingham's headcount data shows that 11% of 3 year olds transitioned from 2 year old funding to extended entitlement, and 7% of 4 year olds transitioned from 2 year old funding to extended entitlement in 2021. Sutton Coldfield District has the highest percentages of transition in Birmingham – 34% and 21% respectively. Ladywood District has the lowest percentages of transition – 5% and 4% respectively.

A slightly smaller proportion of 3- and 4-year-olds transitioned from the 2-year-old funding to extended entitlement in 2021 compared to 2019.

	2019	2021	Percentage point change
3-year-old transition from 2-year-old funding to extended entitlement (%)	13%	11%	-2%
4-year old transition from 2-year-old funding to extended entitlement (%)	8%	7%	-1%

Reasons for not offering EEE places

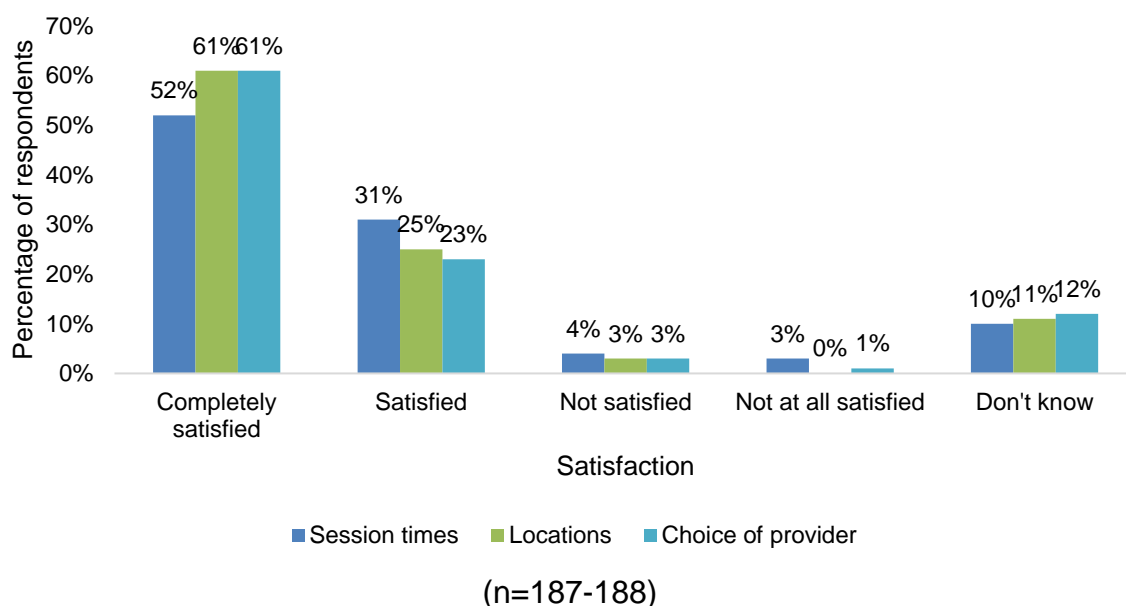
Most providers who responded to our survey reported that they provided at least one form of government-funded childcare; only 11 respondents provided none, mostly childminders. Most often, providers offered 15 hours for 3 and 4 year olds (92%), but large majorities also provided 30 hours (84%), 15 hours for 2 year olds (81%), or all three of these (75%).

We asked those not offering any of the government-funded childcare strands why this was. Most often (n=8), they reported that the 15 hours funded childcare places for 3 and 4 year olds were not financially viable, while 5 respondents each found the 15 hours for 2 year olds and 30 hours financially unviable. Six respondents only offered places to fee-paying parents, and a couple had other reasons, including the fact that the setting offered free places.

Satisfaction with EEE

We asked parents responding to our survey who used free childcare how satisfied they were with the session times, the locations and choice of providers. They could answer completely satisfied, satisfied, not satisfied, not at all satisfied or don't know. The vast majority were completely satisfied or satisfied with session times, locations and choice of providers – 83%, 86%, and 84% respectively (Figure 27). Respondents reported the least satisfaction with session times, but differences were not large.

Figure 27. Satisfaction with free childcare



Awareness of EEE

All the parents we interviewed who had completed our survey and had children below school age were aware of EEE. Those who were eligible used it. Most parents found out about EEE informally - speaking to other parents and family members or staff at childcare settings. One parent had found out about it online. Another parent, who lived outside of Birmingham, received a letter from their local authority informing them about EEE. One parent explained that for people new to the country who have English as an additional language, it is through word of mouth that they will find out about EEE.

Access to EEE

Our research shows a positive picture of access to EEE with data showing a small increase in 2 year old take-up since 2019 and stability in take-up for 3 and 4 year old places, and our survey showing that 77% found it very or fairly easy to find childcare overall. However, it is also important to take account of the examples shared by a small number of parents in interviews, which represent difficulties in accessing EEE. Examples include difficulties in in having to repeatedly prove eligibility to qualify for the 30 hour entitlement, and needing to find out how each setting allows parents to use their free hours. One parent experienced a delay with accessing childcare when using EEE, compared to when he had been a paying parent, and had accessed childcare straightaway. A foster carer did not initially get 30 hours EEE, despite her child having SEND and not being able to go to mainstream school in the September after her fourth birthday. She described fostering as her work, and she did not have a job outside of that. One parent was a supply teacher who worked throughout the year but not during the summer holidays when schools were closed, which made her ineligible for 30 hours EEE. One parent was unsure if her family were eligible so her college was funding 8 hours of childcare instead. She wanted to check whether she was eligible for 15 hours free childcare so that she could study more.

A very high proportion of respondents to our parents' survey were satisfied with the session times of their EEE provision. This was also reflected in the responses to our

interviews. However, for a few parents the hours they were entitled to were not enough. One parent reported that the first nursery she used was awkward about how she could use her free hours.

“[The nursery] make it difficult for you to use your free hours. They always find a way of you having to pay money even though you’ve got 30 free hours. If I wanted to use my entire 30 free hours with the private nursery, I would have had to still top up £800 a month, which is ridiculous. As I said, I have a good salary, but I couldn’t even afford that... The nursery school they allow you, because the emphasis isn’t on money and making a profit, they allow you to use your hours in a way that’s actually suitable for your needs.” – Parent

Impact of EEE

Parents we interviewed were very positive about the impact of EEE. Parents described EEE as a “godsend” and a “lifeline.” Parents reported that the reasons they used EEE were so they could work and study, and because childcare was unaffordable. Parents also described EEE allowing them to have a break and time for themselves. Several parents reported that they would not be able to afford childcare without the free hours.

“It gave us a bit of a life back, especially when she started doing the 30 hours...it gave us a much better balance... I finally was able to relax a bit.” – Foster Carer

Reasons for not using EEE

As part of our research we took part in a number of conversations with parents and professionals about why families did not use their child’s early education entitlements. This included conversations with 18 parents at three ‘stay and play’ sessions in Birmingham, an additional three parents in one-to-one interviews; and discussions with 6 staff members and 3 childminders at the same ‘stay and play’ groups (for more information see section 6. Methodology). While this is a small sample of views, within the larger cohort of those surveyed and interviewed for this research, it is important that a broad range of voices are heard to inform improvement activities across the city.

Awareness

The majority of respondents to our parent survey were aware of the free hours for 2, 3 and 4 year olds. In our conversations with parents and professionals at ‘stay and play’ groups, they suggested that there was a lack of awareness of early years childcare and EEE. Some parents do not know about childcare, some do not know about EEE, and some do not know if they are entitled to it. We heard that some think EEE for 2 year olds is just for people receiving benefits, and do not realise working families with low incomes can also qualify. The childminders we spoke to explained that parents often did not know about EEE until the childminders informed them.

One parent we spoke to wanted to use the free hours but was unsure whether the nursery she wanted to use facilitated EEE. Another parent reported there was a lack of information about childcare services and highlighted that some people might not know what to ask for.

Professionals and parents spoke about there being a particular lack of awareness about EEE among people who have English as an additional language. Some parents highlighted that people who have lived elsewhere and have recently moved to the UK might not have access to information, know what they are entitled to, or know how to

approach the issue of childcare or make childcare arrangements. One parent questioned how parents would know about EEE if they did not speak English.

One parent had not used formal childcare with her oldest child as she did not know about it. She thought there was no provision for children before they started school, otherwise she would have sent her son to nursery, so that he could have the opportunity to learn and socialise. She was now aware and using EEE for her middle child. Once her youngest daughter was eligible, she was also planning to send her to nursery.

One parent spoke about Covid-19 reducing the opportunities for parents to speak to other parents and professionals, which made it harder for parents to know about EEE. One parent highlighted that stay-at-home parents are less likely to meet people who will inform them about EEE. One professional highlighted that free childcare is advertised on government websites but not everyone has online internet access.

One professional spoke about some parents not knowing about the learning element and the skills gained by children at nursery. One parent explained that she had done research and did not believe children needed childcare until school age. She believed that children learnt social skills from their parents.

Availability

Our survey showed that the vast majority of parents (83% to 86%) were completely satisfied or satisfied with session times, session locations and choice of providers (Figure 27). However, in our conversations with a small number of parents at the 'stay and play' session they did cite that a lack of availability in suitable locations, or at suitable times prevented some parents from using childcare. One parent explained that the setting they had used with their older children had stopped offering part-time places and now only offered full-time places, which involved a charge of £70 in addition to the free hours. As a result, the parents had decided to keep their youngest child at home until she went to school. If the setting offered a part-time place and they could use EEE to fund it, the parent would send his child to nursery. He was unsure if he would want her to have a full-time place.

In these conversations a few parents reported that they would have already sent their children to nursery but were waiting for places at settings where their older children attended or near older children's schools. One parent explained that the nursery attached to the school of her older child only accepted children from age 3 and a half. Other nurseries nearby were in the opposite direction to the school. She kept her 2 year old child at home as she did not feel she could take on an extra school run. She also wanted her children to be in the same environment at nursery and then school, and make nursery friends who they would go on to attend school with. If the school nursery offered places for children aged 2, the parent said she would definitely take it - she felt her child was ready and got bored at home.

A small number of parents and professionals reported that it was difficult for parents to travel far, particularly those who did not drive, but that some parents could not find suitable places nearby.

One professional explained that the hours do not work for some parents. Her nursery had set hours five days a week. Another professional explained that some settings had a preference for fee paying children over those that used EEE, so would offer fee paying parents places and deny places to those using EEE.

Cost

For some parents, cost was an obstacle, even if they were eligible for EEE. For example, the family who wanted to use a setting that only offered full-time places could not afford the £70 top up. Other parents said they could not pay for additional hours. Besides paying for additional hours, there were various factors that made childcare unaffordable for parents: one parent explained that the nursery she used charged for food and materials; some nurseries do not allow packed lunches; and some nurseries ask for the first week's fees upfront, which some families cannot afford.

Some parents who were not yet eligible for free hours reported that they would send their child to childcare now if they had free hours but they could not afford it without.

Childcare readiness

Some parents had concerns about whether their child was ready for nursery. They did not want to send them too early while they believed their child was too young. Some had concerns about their children hurting themselves, some wanted to wait until their children were older, and some wanted to wait until their children could communicate so they could tell their parents what their childcare was like. Some also spoke about children only being used to their parents, not other people.

Trust and quality

The majority of parents we surveyed considered their childcare to be extremely suitable, especially formal childcare, with quality the key criteria when choosing. In our conversations with a small number of parents about why they did not take up EEE, a few said they did not trust other people to look after their children, particularly people they did not know. One parent explained that he did not trust institutions and would not feel comfortable leaving his child with other people at nursery where there is no way to monitor what is going on. He did not want others imposing their views on his son. Some parents were anxious about abuse and neglect. One parent said you are trusting someone "blindly" when you leave your child at nursery.

"I don't think anyone else but me and my husband would be comfortable with anyone else looking after them." - Parent

According to Ofsted, the quality of providers in Birmingham is high (93% good or outstanding) but slightly below the national average. In our conversations with parents a few said they were not happy with the quality of childcare settings. Some parents mentioned concerns about staff to child ratios and about children getting enough individual attention. Some parents had bad experiences themselves or had heard about bad experiences of others. One parent sent her two year old to a nursery which had a good Ofsted rating and good reviews, but her child was not given food or milk, and her nappy was not changed. When her child got home she was "hysterical." She withdrew her child after two weeks and planned to keep her at home until she turns 3 and can communicate more. One parent did not want to send her son to his current nursery full-time (which he attended part-time), because they did not do hot dinners and she did not want him eating sandwiches every day. Another parent had relied on informal childcare for her older children due to concerns about the quality of childcare settings. So, while the majority of parents in Birmingham are happy with their childcare provision, it is important to support parents, who have more negative experiences, to access the childcare which meets their child's needs.

Covid-19

In our survey we asked parents if they planned to make any changes to their childcare in early 2022 because of Covid-19. The vast majority, 86%, said they did not plan to make any changes (Figure 29). In our conversations with parents about why they did not take up EEE a few spoke about concerns about children getting ill at nursery, with a few reporting that this had been heightened by Covid-19. Covid-19 also made it difficult for some parents to introduce their children to different environments and help them to become comfortable outside of the home. One parent was particularly concerned about her disabled son as she described him as vulnerable. She had sent her older child to nursery and he had frequently got ill. This was not a problem for her older child, but she was concerned about her younger child's vulnerability.

SEND

Our survey found no difference between the views of parents of children with SEND and other parents in relation to their perception of the suitability of their childcare. However, the former were more likely to express a difficulty in finding childcare. In our conversations with parents about why they did not take up EEE, one parent said they were worried that a childcare setting would not be able to meet her son's needs as he required one-to-one support. She would have liked him to go to nursery but will not send him due to his vulnerability.

Another parent spoke about her concerns due to her son having development delay, autism, and not being vocal. She had been happy to send her daughters to nursery, but was concerned that nursery staff would not look after her son properly because of his additional needs. However, she had recently decided to send him to nursery and was glad she had made this decision.

Fear of judgement

Two parents spoke about fear of judgment preventing parents from using childcare. One spoke about relatives who had grown up abroad and did not know what expectations there were, for example, they did not know what they should wear to pick up or drop off their child, or what their children should wear. This made them feel concerned about being judged by others.

Other responsibilities

Some parents with multiple children found it difficult to manage school drop offs and take their younger children to childcare. One explained that it can be difficult for parents with multiple young children to get the children ready, out of the house, and to childcare.

“So ‘cause I’ve got kids a bit going everywhere left, right and centre... it’s a bit hard for me to go and find a fourth place for this one [the youngest child] now.” - Parent

Perceived advantages of not using formal childcare

Some parents and professionals spoke about parents wanting to spend time with their children. One professional spoke about children being looked after by their grandparents and grandparents not wanting to give up that quality time. One parent thought some parents do not want to let their children go and that they do not know what to do without their children.

Reflecting on why other parents do not use formal childcare, two parents perceived that “laziness” prevented some parents from using childcare. They spoke about there not being a routine for families who do not use childcare, so they can sleep late, or visit relatives abroad without having to worry about childcare commitments. One spoke about other parents not wanting to give up their freedom, so they waited until they were obliged to send their children to school. One thought other parents were not pro-active, not taking steps to find out or arrange childcare or EEE. Both parents spoke about “housewives” preferring their children to stay at home and only using informal childcare when needed. One explained that it is more the norm for working mothers to use childcare than it is for stay-at-home mothers. These parents spoke about ‘stay and play’ groups being good for their own routines.

One parent also spoke about people she knew who kept their children at home until they went to school so that they learnt their mother tongue.

Process and criteria

Professionals spoke about the process of applying for EEE being an obstacle. Some professionals discussed the process being online, which could put people off, or exclude those without internet access. One professional spoke about some parents not being able to read and write themselves, making it harder for them to know about childcare and EEE, and also making it more difficult for them to complete forms. Other professionals agreed that for some parents, understanding the form was difficult and the process sounded too complicated.

Parents and professionals spoke about the EEE criteria being a barrier to parents accessing childcare. They spoke about the maximum income threshold for 2 year old EEE being low and spoke about families on the cusp missing out. Parents and professionals spoke about the needs of children not being taking into account. Some parents were waiting until they were eligible for EEE even though they would like to use childcare earlier. Some parents were unsure whether they were entitled to EEE, suggesting the criteria are not clear.

Recommendations from parents and professionals

Several suggestions were made about making information more accessible. Parents and professionals recommended more advertising and promotion of EEE, at ‘stay and play’ sessions for example. One parent suggested Birmingham City Council should pro-actively share information with parents, for example, by sending information through the post, rather than the onus being on parents to do the research. Another parent recommended more translators be used to help to communicate information to parents who do not speak English, such as in Children’s Centres. One parent advocated clearer information on government websites and in the local community – at leisure centres, community centres, zoos, and aquariums. One professional suggested that parents could be visited in their homes when there are language barriers or disabilities to help them find out information, and to assist them in completing forms.

Some parents and professionals recommended more financial support for childcare, for example, by widening the criteria for EEE, or by offering more than 15 hours free for 2 year olds.

One parent suggested taster days, open days, and ‘fun days’ at childcare settings that parents could attend with their children to encourage them to use childcare. Some

professionals also suggested open mornings at nurseries before parents decided whether they wanted to apply, like a pre-application 'stay and play' session in a nursery setting.

One parent proposed that Birmingham City Council could do more to encourage parents to use 'stay and plays'. This could increase their child's confidence and increase parents' confidence that their child would be OK at childcare. One parent suggested that a service to pick children up and take them to childcare would help some parents. One parent proposed that settings that only offer places to older children could extend their offer to younger children.

Sufficiency

In terms of numbers, the overwhelming demand for Early Education and Childcare places is required for the 0 to 4 age range. Demand for places is based on parental requirements such as childcare for when they are at work or study and take up of early education entitlements.

The latest population data for under 5s in Birmingham (NHS, May 2021) identifies that there are 78,589 under-five years living in Birmingham. As outlined previously, as of August 2021 there are 24,247 PVI places and 9,178 FTE EEE school places. As of the latest Sufficiency Assessment Spring 2022 for under 5s, there is a general oversupply of 19,774 part-time places, with a surplus of 2,014 places for 2 year olds specifically. Although there is a general oversupply of places citywide, there are several wards in the city that have a deficit of places. These should be monitored going forwards as there will be implications if demand for places increases or there are reductions in supply of places. The key wards affected are detailed in Table 26. Harborne, Longbridge and West Heath, Holyhead, and Handsworth Wood were also among the six most affected wards in 2019.

Table 26. Number of deficit places in the six most affected wards, 2022 (for data on deficit places in other wards see Appendix 16).

Ward	Deficit of places in Spring Term 2022
Harborne	-372
Holyhead	-276
King's Norton South	-240
Perry Common	-153
Handsworth Wood	-150
Longbridge & West Heath	-128

Similarly, there are a number of wards with an oversupply of places well in excess of the city average as detailed in Table 27. This pattern across wards was less consistent compared to those with deficits, with just Edgbaston and Brandwood & King's Heath in those with the greatest surplus in 2019.

Table 27. Number of surplus places in the six most affected wards, 2022 (for data on surplus places in other wards see Appendix 16).

Ward	Surplus of places in Spring Term 2022
Edgbaston	2,426
Nechells	1,027
Brandwood & King's Heath	838
Soho & Jewellery Quarter	768
Sutton Vesey	757

Migration may play a role in surplus places. In the summer term of 2021, just over half (57%) of children in Birmingham accessing EEE childcare places through PVI providers and schools resided in the same ward as their childcare provider, meaning that 43% of children lived in a different Birmingham ward to their provider.

This varied widely from area to area. For example, for just 15% of children residing in Nechells attended a childcare provider in a different ward. This is compared to the 94% of children in Yardley East, the only ward which has no school within its boundaries, who attended childcare in a different ward. Wards where significant proportions and numbers of children accessing childcare in a different ward to where they lived are provided in Table 28.

Table 28. Wards with the highest proportion of children accessing EEE childcare places outside of their residential ward, and number, Autumn 2021.

Ward	Number of children accessing childcare outside their residential ward	Proportion children accessing childcare outside their home ward
Yardley East	147	94%
Perry Common	148	73%
Stirchley	101	72%
Sutton Four Oaks	59	70%
Bournville & Cotteridge	152	69%
King's Norton South	149	69%

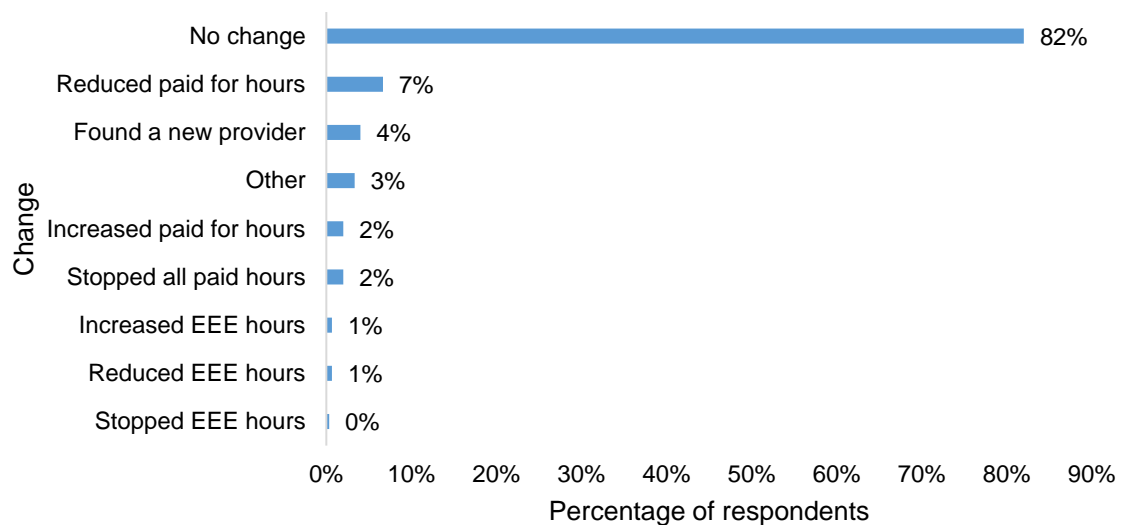
The impact of Covid-19

Impact of Covid-19 on parents

Changes made to childcare due to Covid-19

We asked parents that responded to our survey if they had made any changes to their childcare because of Covid-19. The vast majority (82%) had not (Figure 28).

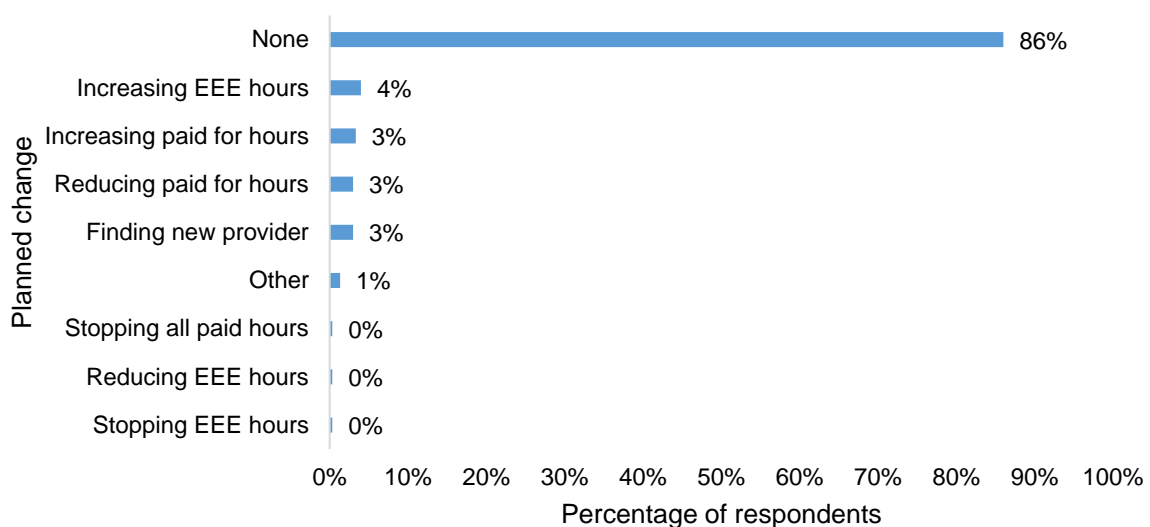
Figure 28. Changes to childcare because of Covid-19



(n=300)

We also asked if they planned to make any changes to their childcare in early 2022 because of Covid-19. Similarly, 86% did not plan to make any changes (Figure 29).

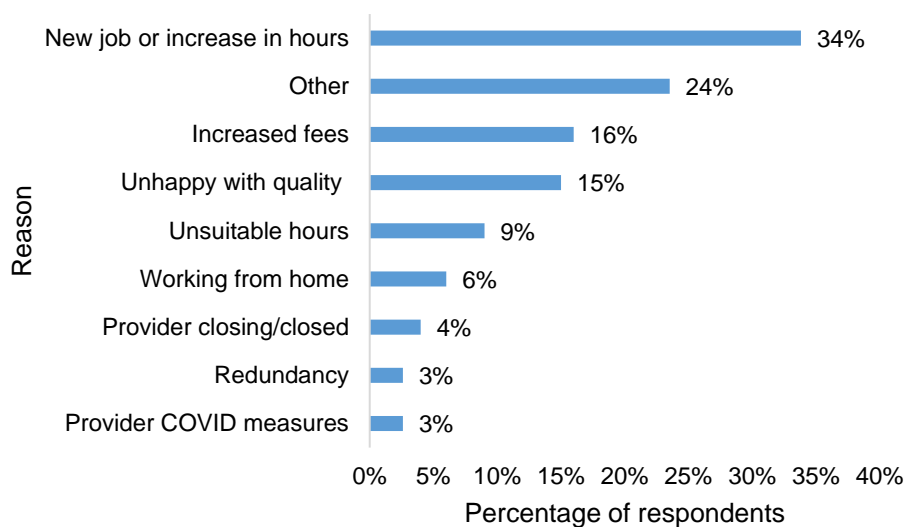
Figure 29. Planned changes to childcare because of Covid-19



(n=300)

Among the minority who did report plans to make changes to their childcare arrangements in 2022, we asked why. The most common answer was that they or their partner had a new job or their hours had increased (34%) (Figure 30). Only 3% cited their provider's Covid-19 measures.

Figure 30. Reasons for changes to childcare



(n=68)

Some of those responding ‘other’ explained their answers in written comments, including ‘need extra childcare due to pregnancy’, ‘I will complete my studies and will not be eligible for free child care’, and ‘child has turned 3’.

Parents had mixed experiences of childcare during the pandemic. Some parents reported that the pandemic did not have a big impact on their childcare needs. Some children already had places at settings which stayed open during lockdowns. One parent said that she now missed being at home as much as she had been during the pandemic, since she had changed her working patterns once she was able to use childcare again after the lockdowns.

Securing childcare during lockdowns

Some parents we interviewed explained that settings were not accepting new children during lockdown. One parent had to find another nursery three days before going back to work, as the nursery where her child had been accepted stopped enrolling new children due to the pandemic. For one parent, her child had to stay at home as he did not already have a childcare place.

One parent explained that just before the pandemic she had found a childminder to meet the needs of all three of her children – “the perfect set up.” The childminder closed down due to the pandemic and the school closed after school care until September 2021. She described trying to find childcare as a “massive headache” and “really difficult.” She looked online, asked the school and approached people in the playground. She did eventually find childcare to meet her needs, but that involved two childminders, meaning two drop-offs and pick-ups every day. Ideally she would prefer one childminder to cover all of her childcare needs.

One parent explained that she could not use childcare due to restrictions but actually needed more support, because she wasn’t allowed to bring her child to appointments, if she needed to go to the dentist for example. A foster carer reported that they received no help during lockdown as in-person visits by social workers were stopped.

When schools were closed, some parents had to rely on informal childcare and move shifts to juggle childcare. Challenges of home schooling and keeping children entertained were mentioned.

“It’s not realistic to ask me to provide advice to do my job and be with a baby.” – Parent

Using childcare during the pandemic

Once things reopened, one parent spoke about her child having to get used to childcare again after a long period at home. Parents spoke about disruption caused by childminders catching Covid-19 and being unable to look after their children. As a result, one parent could not work and was concerned this would impact her eligibility for EEE. Parents explained that their children could not attend nursery with any symptoms of colds or coughs and that they would be sent home. One parent mentioned missing work when her son had to isolate.

Another parent explained that she felt she had not been able to assess childcare settings because of Covid-19 rules preventing parents from going inside. On the other hand, a foster carer described problems in one nursery where they were not stopping people going inside or requiring people to wear masks. The foster carer’s child was described as being in and out of nursery due to Covid-19 cases.

Impact of the pandemic on children

Parents we interviewed spoke about their children having less opportunities to do activities, experience new environments and interact with other children during the pandemic. Some parents spoke about not being able to take their children to ‘stay and play’ groups. One parent reported that the lack of interaction for her child during the pandemic impacted his speech development. Another parent commented on children being more reserved and quiet.

Expected changes to childcare due to Covid-19

Generally, the parents we spoke to did not have present concerns about Covid-19 impacting their childcare needs.

The impact of workplace policies

Workplaces of some parents we interviewed had introduced home working as a result of the pandemic. One parent described the positive impact of this, as he could now watch his children if needed; previously they would have had to rely on friends and family. Some parents identified working from home at the same time as trying to look after their children or home school as challenging. Most working parents reported that their workplaces were flexible and supportive when it came to childcare issues.

“We can do home working but home working is not a childcare solution.” – Parent

The employers we interviewed were also positive about the changes that had occurred in their workplaces following the pandemic, particularly around increased flexible working and work-life balance. Employers knew that people had struggled, and many had conducted surveys with their employees to gather their views.

One employer identified that having children under 7 was particularly challenging due to the attention that they need if they are at home at the same time that employees are attempting to work from home, and that it was a big relief for those parents when schools

re-opened. Another observed the difficulties that occur for parents when they have to look after children following positive Covid-19 tests or, for example, when their whole year group has been sent home.

The main change employers identified for their employees, and employees who are parents and carers, was around flexibility about where and when employees worked. All employers we spoke to mentioned increased working from home, flexible working hours and requests for it. One employer quantified this, saying that the number of people in the office had halved in two years. The employer we spoke to within an education setting, however, noted that flexible working was difficult to agree for most staff when general government advice to work from home did not apply in education, where instead on-site and face-to-face working was expected for both employees and students.

Employers noted how increased flexible working meant that parents and carers could more easily do school drop offs and pick-ups, that they saved time by not commuting, and that they now have more time with their children. One employer mentioned that some employees were grateful for the furlough scheme, and that they were able to offer employees the opportunity to volunteer for it, including part-time furlough, and that parents tended to take that offer up in order to spend more time with their children. This employer suggested that following the experience of furlough, parents “have had that experience of maybe more time and they have realised what they are missing out on”. Similarly, another employer described running a 3 month trial where many parents reduced their hours to 4 days a week to help with childcare, which they then continued with and had their contracts changed because it worked well for them.

Many employers described a change in attitude towards work-life balance, both with their employees and their organisation’s work culture. For employees, employers said this was an “appreciation for home and work balance and people realising that they can just log off at 5pm and the work will still be there the next day”. One employer suggested that greater clarity of thought and feeling had emerged when it came to work and life, “I don’t have to feel guilty that I am putting a lot of time into work and I don’t have to feel guilty I am putting a lot of time into my family”, with employees saying when consulted, “yep, let me switch off; let me do the school run”. Another employer echoed that employees felt free to ask their managers for flexibility to accommodate childcare demands, and that employees did not have to tell others where they are as much – they just join a video call. Another employer detailed how their work culture had changed from working long hours, to understanding “the importance of family life” after employees had “enjoyed being able to put the kids to bed, or pick them up from school”, that “their and our expectation of their workload” has changed.

September 2020 and again in 2021, but not been able to replace them with new cohorts of children as usual.

However, not every provider reported a lack of demand, some settings had seen uptake increase or at least remain steady. The demand for childcare appears to vary depending on a number of interrelated factors, including a setting’s location and size, their target audience, as well as the availability of childcare within their locality.

Location of provider

Childcare provision is a very localised service as families do not tend to travel far to reach a setting. One nursery manager within a chain of nurseries, for example described one

setting as ‘bursting to the seam’ with a waiting list, while another setting three miles down the road was running at half capacity. Settings based in areas with many keyworker families, such as near hospitals and the university, were more likely to report a high demand for childcare throughout the pandemic.

Size of provider

Some larger settings, such as private nurseries and school nurseries, perceived their size as a barrier to parents choosing their setting. Parents, especially those with younger children, were said to avoid larger settings due to the perceived greater risk of exposure to Covid-19. Some childminders appear to have benefited during the pandemic, as parents often preferred smaller settings, where the risk of infection was perceived as less likely, but again this depended on their location.

Target audience

Overall, providers described families’ need for childcare during the pandemic according to whether they were working or not, which to a large degree was perceived along socio-economic lines too. There was one group of parents who needed childcare because they were working and hence did not have a choice about whether to access childcare or not. Then there was another group of parents who did have a choice, because one or both parents were not working. In this latter group, most parents opted to keep their young children at home during the pandemic as they worried about the risk. Especially families who qualified for the EEE funding for their 2-year-olds chose not to access childcare, their child simply stayed at home. For providers who primarily catered to this group of families, often in deprived communities, the impact on both settings and the children have been evident.

However, even within these two broad groups there were variations. In the aftermath of both national lockdowns, many working parents continued to work from home or were able to work more flexibly. Such shifting work patterns, including parents sharing childcare responsibilities, continue to impact demand, especially for wraparound childcare for school-aged children. Settings that primarily offer before and after school childcare continues to be impacted as many parents now do the school run themselves. Two providers mentioned losing 10% to 15% of their school-aged children. Another provider we spoke to, had gone from having 32 to 36 school children per session prior to the pandemic, to having just 10 to 15 children in January 2022. Some working parents are still using childcare, but have reduced their hours.

Availability of childcare in local area

A few providers we interviewed mentioned how demand for childcare in their area had increased or remained steady, in part due to local nurseries closing or childminders retiring during the pandemic. A shortage of local childcare was described as benefitting their settings.

In other areas, however, providers described the current childcare market as highly competitive due to a high number of local providers. As one provider mentioned:

‘We’re fighting with each other just to get the children [laughs]. We’re just stealing kids from each other’ – Provider

In such areas, providers were often struggling financially as local supply exceeded the demand for childcare places, to the extent where one provider wondered “where have all the children gone?”

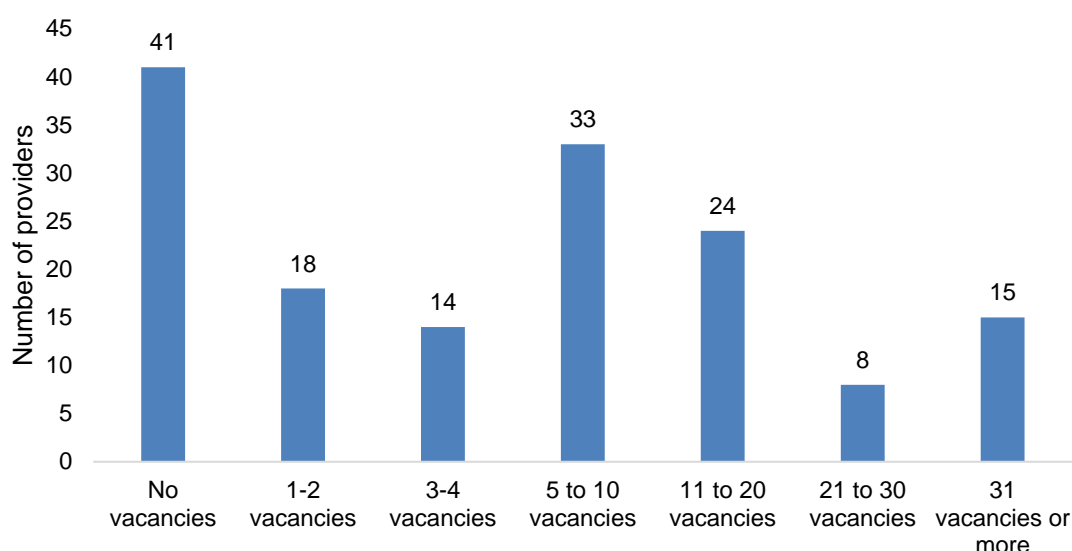
Some providers saw parents choosing school nurseries over their own setting, because parents believed this would help their child secure a place in the primary school. School nurseries, on the other hand, often felt they were unable to compete with private providers as their hours tended to be limited to short sessions and term-time only.

Such conflicting factors suggest that the childcare sector may be even more complex, localised and fractured post-pandemic, than it was prior to the pandemic.

Vacancies

Most providers (73%) had at least one vacancy (Figure 31). Providers told us about a total of 1,749 vacancies across 112 providers with at least one vacancy (a mean average of over 15 vacancies per provider). The most common number of vacancies was 10.

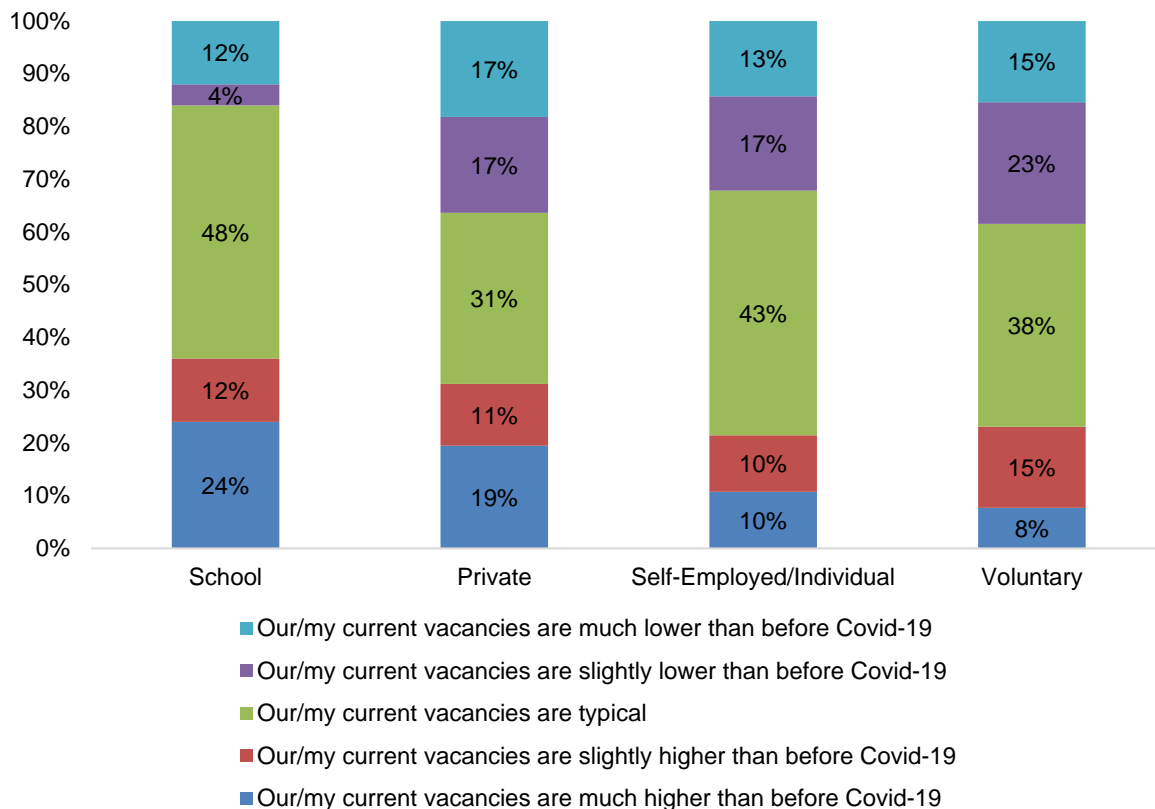
Figure 31. Extent of vacancies



(n=153)

Views were split among those telling us whether these vacancies were typical of the number they would have had in an Autumn Term before the Covid-19 pandemic; 30% said higher, 32% said lower, and 38% said typical. Looking at the most common sectors among respondents, the level of vacancies was most stable in schools, and the greater change (higher and lower) among private sector providers (Figure 32).

Figure 32. Change in vacancies since Covid-19 by sector

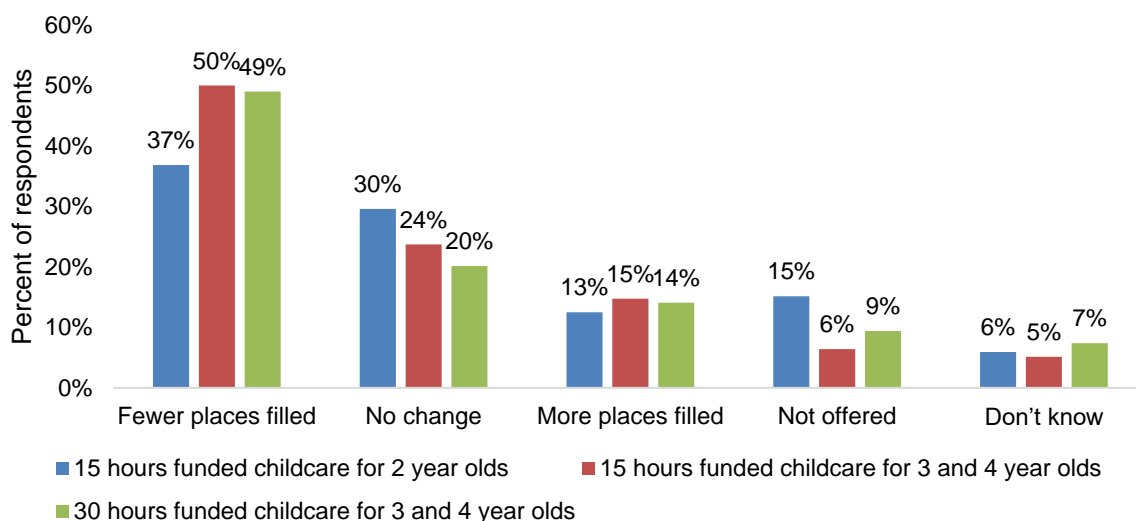


(n=89)

Covid-19 changes in free places filled

We asked providers how many places they had filled in the (then) current Autumn 2021 term, compared to the pre-pandemic situation two years earlier in Autumn Term 2019. We found it most common that fewer places for children had been filled, though 20% to 30% had experienced no change (or 24% to 38%, excluding 'not offered' and 'don't know').

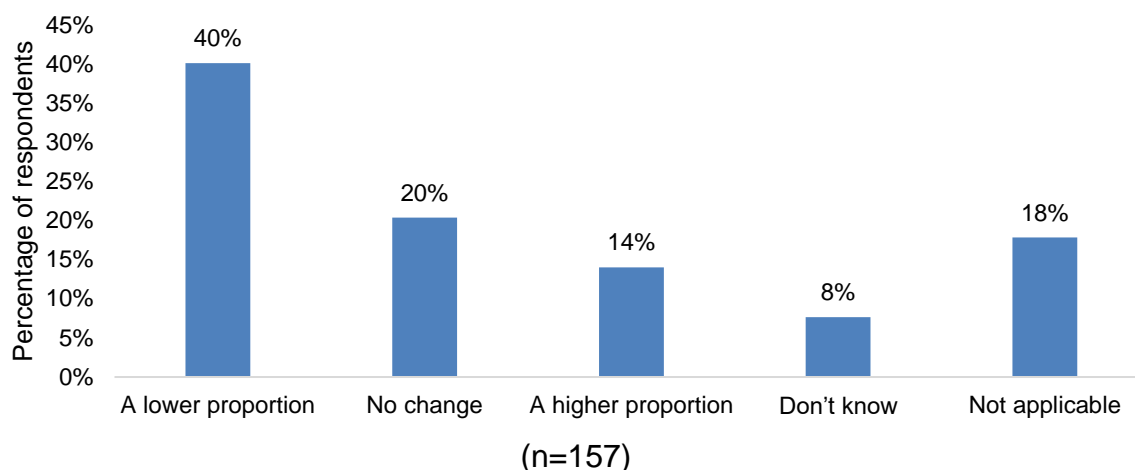
Figure 33. Free places filled, Autumn term 2019 vs 2021



(n=149-156)

This change was more marked when considering the financial impact of covid-19 (Figure 34). We asked how much of providers' total income came from fees paid by parents/carers in Autumn term 2021 compared to Autumn term 2019. Most often, parent fees made up a lower proportion of total income in 2021 (40% of all respondents, or 54% excluding don't know and not applicable).

Figure 34. Parent fees as a proportion of providers' total income, 2019 vs 2021



Changes made by providers to staffing and operations since September 2021

Our survey asked providers what, if any, Covid-related changes they had made since September 2021. The overall picture was one of continuity, rather than change, with no operational actions taken by the largest number of providers (Figure 35). Staffing changes were also not widespread, with the largest number of providers making none of the changes we asked about (Figure 36). Changes might have been more widespread if the questions had covered a longer time frame.

Figure 35. Operational actions taken by providers since September 2021

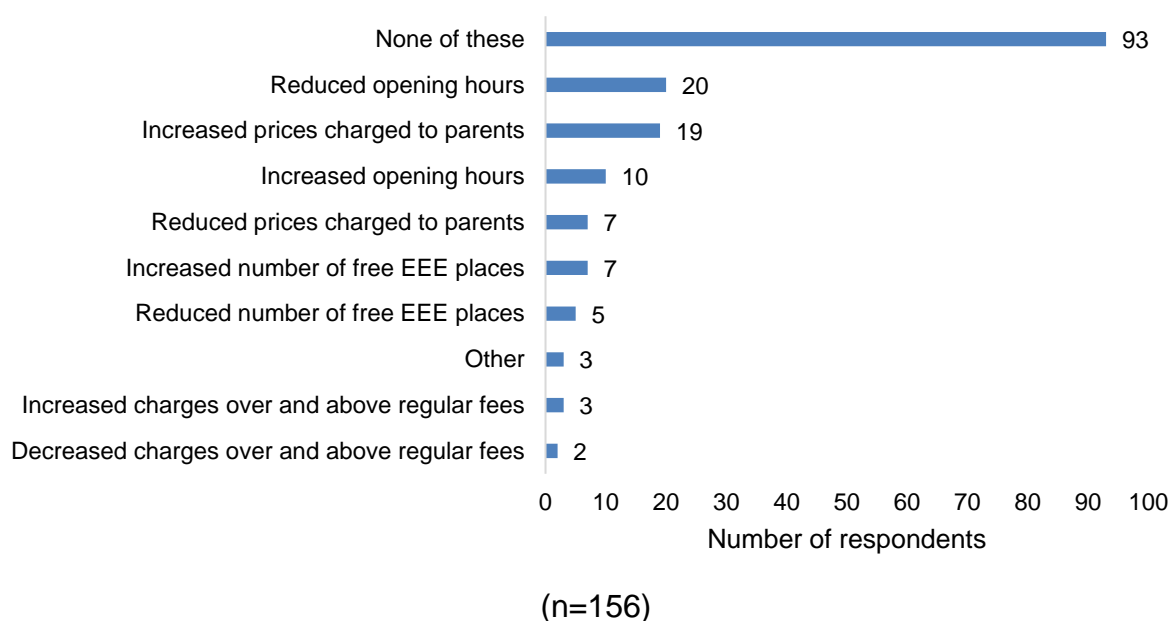
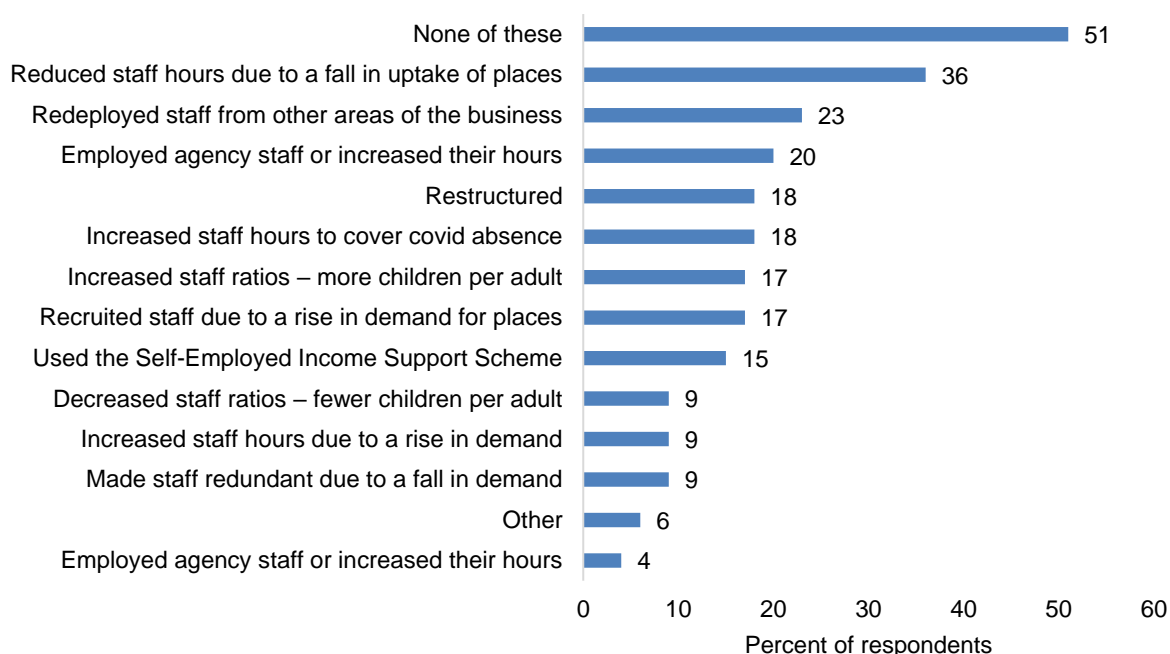


Figure 36. Staffing changes made by providers since September 2021



(n=156)

Note: some answer options have been truncated. The Self-Employment Income Support Scheme we asked about was that where the claims process closed on 30 September 2021.

Among the 116 providers who had made recent Covid-related changes, 277 operational and staffing changes were made in total. Respondents explained in written comments that, among the ‘other’ operational changes, were: closing a nursery temporarily; combining with another nursery; closing early on Friday evenings; operating in term time only; and parents sending in packed lunches for children not eligible for free school meals. Among the ‘other’ staffing changes were: employing extra staff to support children with SEND; changes due to maternity; and not replacing staff who have left. One provider commented that their staff ratios changed:

“from 1:9 to 1:15 initially due to class bubbles and then losing staff during the pandemic. We are not able to recruit at this stage due to uncertainty around attendance in the future.” – Provider

National Covid-19 restrictions meant that settings *had* to make changes to how they delivered their services. Most mentioned making changes to staffing and operations, such as wearing face masks, increased handwashing, open windows and extra cleaning – some which have stayed in place.

Many larger settings introduced childcare bubbles within their setting by keeping children and staff in separate rooms. Some had continued to do so after restrictions were lifted, although among the providers we spoke to none had continued to do so into 2022. Childcare bubbles were described as incredibly expensive to run, especially in terms of staff cost, as providers had to overstaff each bubble to accommodate staff annual leave, illness or isolation. This had impacted their profitability, as extra costs were self-funded.

All the providers we spoke to also mentioned introducing 'doorstep' policies for drop off and pick up. Again, most had continued doing so after national restrictions were lifted and many believed they would continue into 2022. For some settings this was because it made them and their staff feel safer. As one childminder mentioned:

'I don't want them in, I don't know who they've mixed with or anything. So I'd rather stand outside the front door with a coat on and tell them how the day has gone.' –
Childminder

Other providers had found it easier to greet children outside, and that children often settled better and quicker when their parents did not come into the setting. One provider who used to have an open-door policy, said they would continue to greet children at the door, except for a few children who needed their parents to help them settle in successfully.

In response to the reduction in demand, a few providers mentioned having to reduce their opening hours or change staff hours. In one setting, some staff were transferred to zero-hour contracts, while another member of staff had moved job. In another setting, staff had initially been furloughed and later there had been enough 'natural wastage' to ensure that the setting didn't have to lay off staff.

However, being able to staff their setting adequately was now a growing issue for most providers interviewed. Staff illnesses and isolation, as well as staff having to look after their own children when isolating was having an impact on settings now. As one nursery manager points out:

'Right now, we've got so many people isolating, we have virtually no staff. This happens every time there's a wave, and it's no surprise if lots of people in the community are testing positive then lots of people here are. One of the most difficult things for us now, is that if children are contacts, they don't have to isolate, but – OK, so staff don't have to [isolate] if they are double vaccinated – but if they're not, and we've got quite a few staff that aren't, they have to isolate. So the children don't have to isolate, but the staff do, so you have same number of children but fewer staff. And that has really affected us.' –
Nursery Manager

Impact of Covid-19 on children

Young children, those born just before or during the pandemic, were described as having been highly impacted by the pandemic. The childcare providers we interviewed, all spoke about more children with poor language and communication skills accessing their setting now compared to prior to the pandemic. Children's social skills were delayed, they were often unable to share and take turns, they would hit other children and they were unfamiliar with waiting for adult attention. Providers were having to introduce basic social skills, which was time consuming for practitioners. Children's language and communication were described as very behind. One play group manager mentioned children starting in their setting using 'babified' language and being unable to understand basic instructions such as 'hang your coat'.

Providers pointed out that because everything had been closed during the pandemic families had been unable to access play groups, baby swimming, soft play and toddler groups. As one provider said, 'they haven't been anywhere' and childcare providers are now seeing the impact that the isolation of young children has caused.

'A lot of the children's needs are changing. Since the pandemic, [children are] coming in with low speech and language; low physical development; low personal and social and emotional, and they're very behind in that area due to isolation.' – School nursery manager

Another growing issue for providers is the many unrecognised or undiagnosed additional needs children are presenting with. Such needs are often only being identified by childcare providers when children start attending their setting:

"You do not know who you are getting. You are just getting a name on a piece of paper. You do not know them until they come for their settling-in session and then you are like 'oh wow crikey'." – Private nursery manager

One person we interviewed highlighted that due to the pandemic, families had frequently been unable to attend early years services, such as their health visitors, and parents were therefore often unaware or in denial about their children's special needs.

Many of the providers that we spoke to appear to go beyond what would commonly be expected of childcare providers, as they signpost parents, facilitate contact with other organisations, liaise with professionals, complete referrals, arrange appointments and have difficult conversations with parents about their children's needs.

"... it's not my job to find them a health visitor, but it is my job now... I make sure the ball is rolling, get the GP actively involved, get the health professionals involved. So I find that a lot of my job now is time consuming." – Play group leader

This is putting additional pressure on settings. In one private nursery, the SENCo role was divided between three members of staff as it was too much for one person to handle, and smaller settings also struggled with the paperwork caused by a growing number of referrals and assessments.

Outlook for 2022 and beyond

Workplace policies

Many of the employers we spoke to said they already provided flexible working, or were already looking towards it and hybrid ways of working, that they had not instructed everyone to return to the office with the exception of customer facing/face-to-face staff. In some instances, employers had already introduced a working from home policy and a safe working policy (having the correct equipment and set-up), neither of which existed before the pandemic for one employer. One employer highlighted the context, saying the situation is volatile, and that flexible working will stay in place for the next six months, the time period over which they have extended their serviced office contract. Other employers suggested that there will be even greater flexibility than before the pandemic and/or that they are in the process of formalising this flexibility and creating new work norms.

One employer said the desire for hybrid working with flexibility and work-life balance was what came back in a survey of staff. This employer explained that when schools were closed they were proud to have children and dogs on camera, "that is normal, that's absolutely fine', people have childcare responsibilities", and that if the outcome for their customers is unchanged, then flexibility for parents is desired. This employer spoke of normalising this new work culture where there is accommodation and consideration of other's needs, so carers "can say 'can we not have meetings at 9am'". This employer

noted that they had not moved to this officially, but it was what they have been encouraging, and they are putting their managers through a course for greater “compassion and empathy to see life from employees’ lens”. Another employer said that they now have a whole team “that is focusing on work places and benefits and what our employees want, with surveys sent out, so I think it is a really good opportunity for parents to speak out and say ‘I want more support in this way’ which people have already done”. Another employer thought “there might be requests from staff to reduce their hours to accommodate childcare issues” which they would have to consider as they go.

Expected demand and uptake of childcare in 2022

Following two very difficult years, the providers we interviewed were slowly seeing demand go up. Parents who had been reluctant to access childcare, especially for their younger children, were slowly beginning to enquire about places. One nursery provider mentioned that they had started to do more showings of their setting and had received bookings for September 2022. But as mentioned earlier, this was perceived as a slow return rather than a rush for places. Providers in certain areas of Birmingham were having to do more promotion of their setting to attract parents, and some nurseries talked about trying to be more flexible to better meet parents’ changing childcare needs, for example, by being more accommodating by letting parents change their hours. While we can’t confirm whether settings are more flexible than previously, this may be an outcome of the increased competition within the childcare market.

“I think places are picking up, but I wouldn’t say they’re picking up dramatically, compared to a couple of years ago. We had full attendance, the waiting lists were full. The waiting lists are empty at the moment. We’re having to go out and advertise a lot more, putting up more banners, giving out more safety leaflets, trying to recruit as much as we can.” – Play group leader

Employers that we spoke to generally did not think that there would be any change to childcare demands going forward, relative to during the pandemic. One suggested that it would be important to enable the separation of work and home life, that parents “don’t want to be trying to care for children and working at the same time, I think that’s key for mental wellbeing so we don’t overwork”, and that the flexibility that childcare provides is still desired. Similarly, another thought that parents and carers had enjoyed the balance of spending more time with their kids. However, the education sector employer that we spoke to did not anticipate any change for their staff and students, with them having to be ‘in’, but “for organisations that can allow flexible working and home working, you could see childcare provision dropping drastically in terms of their requirements”.

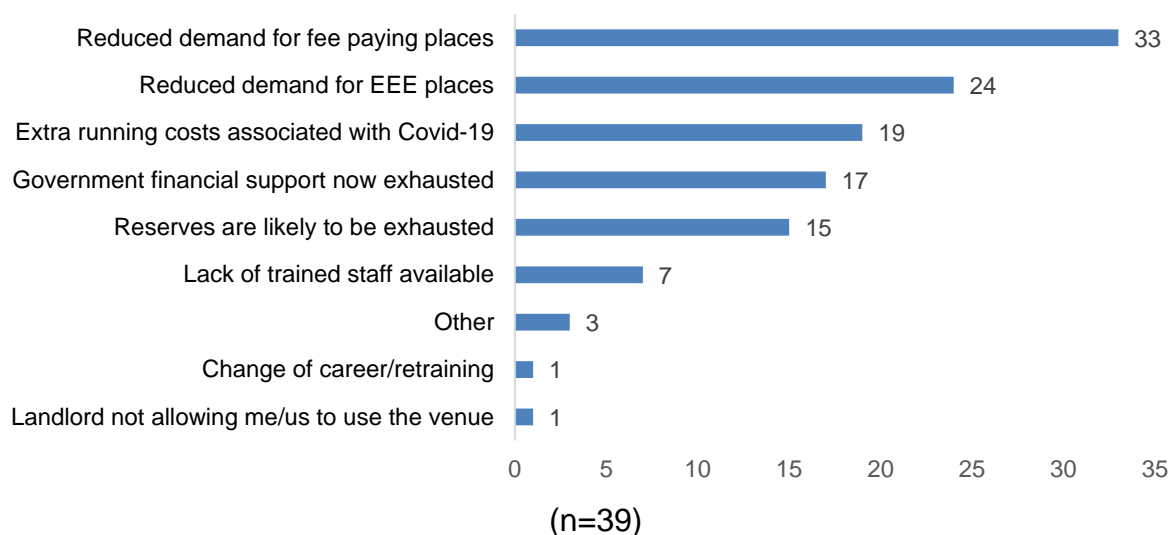
Confidence that providers would continue to operate in future

We asked providers how confident they were (in November/December 2021) that their childcare setting would still be operating in Spring 2022. Overall, 42% were very confident, and 71% were either confident or very confident of this, while 19% were neither confident nor not confident, and 10% not confident (n=14) or not at all confident (n=2, both PVI nurseries).

We asked providers who felt a lack of confidence why this was (Figure 37). Respondents selected a range of reasons, mostly more than one. Reduced demand for fee-paying places was the most often selected reason. ‘Other’ reasons included income being too low to fund necessary investment in the property, and lack of extra funds in the bank.

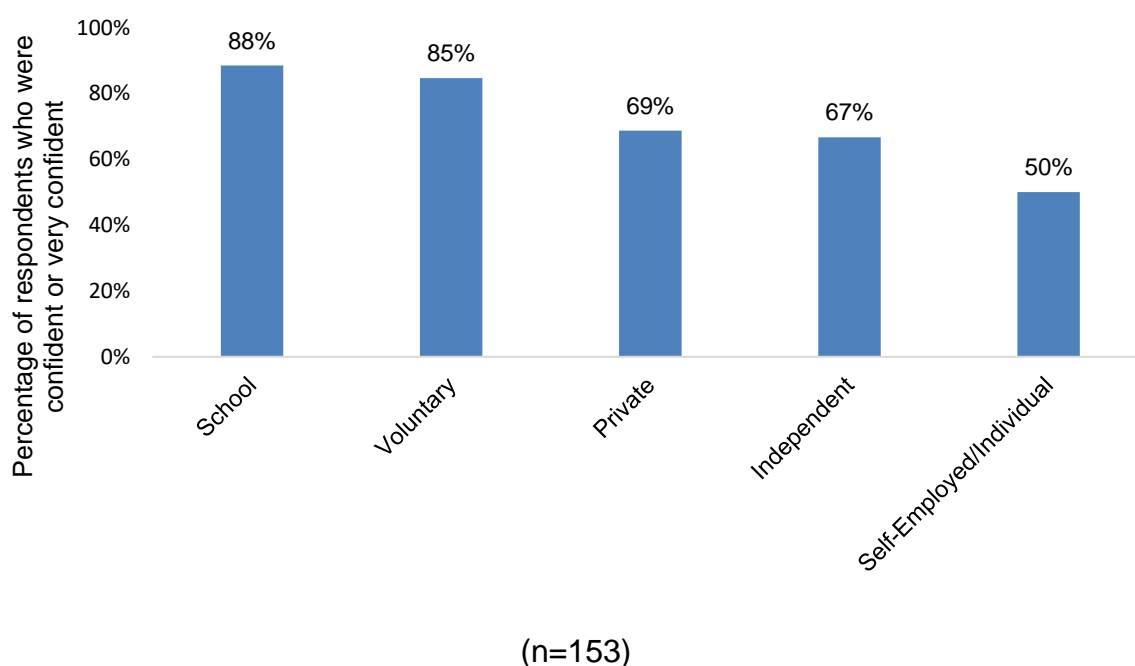
Among those offering a single reason, the reasons were: reduced demand for fee-paying places; lack of available trained staff; the extra running costs associated with Covid, and other (stress related to Covid restrictions). Three answer options were not selected by any respondents: retirement, being bought out by other provider, and moving to another country or area.

Figure 37. Reasons for lack of confidence that setting will remain operating



We looked at levels of confidence by provider setting, merging academies and maintained schools into one category. Self-employed individuals (n=28) stood out as the least confident group, with half not confident about their immediate future, when asked in November and December 2021 (Figure 38).

Figure 38. Confidence that childcare setting will remain operating by sector



Comparing maintained nursery schools to nursery classes within primary schools, the latter were more confident, with 100% of 13 respondents confident or very confident, while

14% of maintained nurseries responded 'neither confident or not confident', the remainder being confident or very confident.

We did not carry out this analysis of confidence on the small numbers of respondents answering on behalf of wraparound clubs, pre-school playgroups and holiday schemes. Respondents could complete the survey in respect of more than one provider type, and did so, in the case of these provision types. For example, we heard from one private nursery manager who also ran an after school club and holiday play scheme. We do not know which type or types of provision respondents were thinking of in answering this question.

The providers we spoke to were uncertain about the future. While most were cautiously positive and thought they would be okay, there was an element of having to wait and see. One childminder highlighted that for her this uncertainty was a common feature of the job and that childcare was precarious work at the best of time, as parents could and would terminate their contract as they situation changed. However, most providers acknowledged that the current uncertainty ran much deeper as the pandemic had changed parents' way of working, altered demand and increased the needs of children accessing their setting.

"It will improve... it will take a while to get back to what it used to be, because a lot of families have got used to doing things differently, like working from home, sharing the childcare etc. It has changed family dynamics" – Nursery manager

"Just keep our head above water and provide the best that we can. We don't know what's round the corner. At the moment, we are still here, and we are still surviving. I know after school clubs that have closed due to the pandemic and the numbers [are still low]. We appreciate that we are still here at the moment." – After school club manager

Offering EEE childcare places in January 2022

Our survey asked (in November/December 2021) whether providers expected to offer the different types of free childcare, and/or fee-paying places, from January 2022. Levels of uncertainty were low, with only 3%-6% replying 'uncertain' per type of childcare. The percentage answering yes (do expect to offer) was high, the highest being fee-paying places at 92%, followed by 15 hours funded childcare for 3 and 4 year olds (90%), 30 hours for 3 and 4 year olds (87%) and 15 hours for 2 year olds (86%).

We asked those who were uncertain or said they would not be offering one or more early education entitlement or fee paying places to tell us why. Eighteen respondents wrote comments, including being at capacity, lack of demand or uncertainty about demand, places all having been taken, and not having any eligible children on the roll. One comment read "too much paperwork". Three respondents wrote about the funding of EEEs:

"Funding rate is low" - Provider

"The 3-4 year funding is under my hourly rate" – Provider

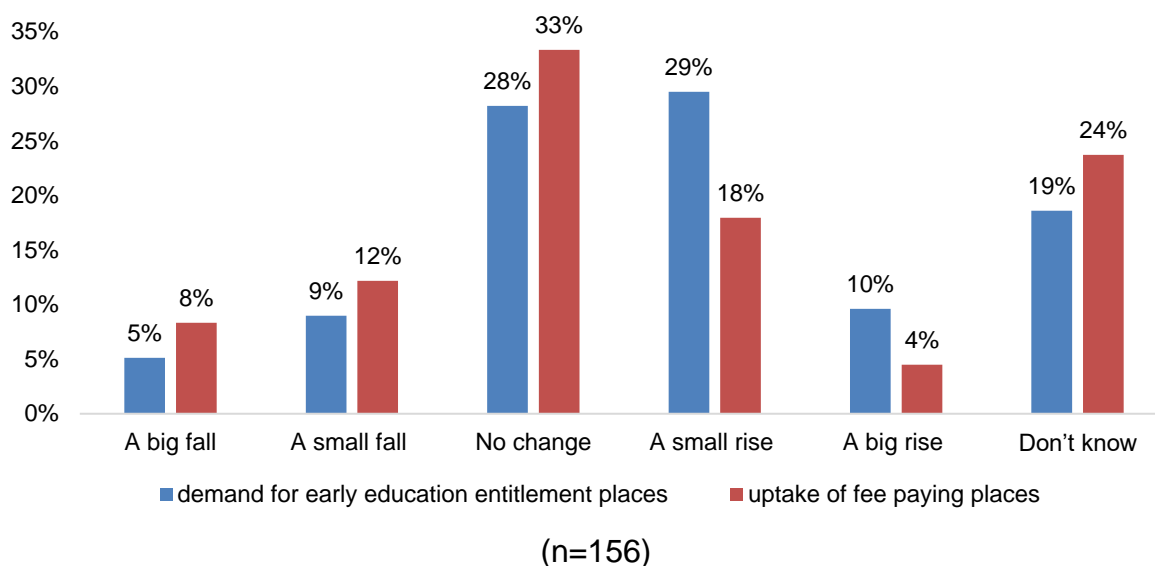
"Offering EEE is more work than we would gain from it." – Provider

Among the providers we interviewed, all but one setting offered some or all the EEE funding to their families. When asked why, providers highlighted that they offered it because ‘the community needs it’, ‘parents want the funding’, and while it was not always financially beneficial for settings to offer the entitlements, if they did not, they ran the risk of parents choosing to go elsewhere.

Level of occupancy expected in January 2022

Our provider survey asked ‘What do you expect will happen to demand for early education entitlement places from January 2022, compared to 2021?’ We also asked about expectations of uptake of fee-paying places over the same time horizon. Substantial minorities of 19%-24% did not hazard a guess, replying ‘don’t know’, and large numbers also predicted no change, but rises were predicted more often than falls (Figure 39). Slightly more respondents foresaw an increase in demand for EEE places (29%) than expected no change (28%), whereas the most common answer in respect of fee-paying places was no change (33%).

Figure 39. Expectations about demand and uptake of places, 2021 vs 2022



We asked respondents to explain their answers. Among the minority foreseeing a big fall in demand/update, reasons included parents wanting to spend time with their children, parents working from home, and the uncertainty of the pandemic. One wrote: “Parents are having a different outlook on work life balance”. Among those expecting a smaller fall, comments included “people haven’t got the disposable income”, “People are financially struggling and not returning to work”.

Among those who foresaw a big rise in demand/uptake, comments included parents going back to work, “more parents are working and coming off benefits”, and “lockdown children have been coming in with more SEN needs parents are demanding places as unable to cope with child at home”. Among those expecting a smaller rise, comments were similar, but also included: “Nearby nurseries closing or reducing sessions = more demand for our nursery” and “parents keen for children to socialise”.

Among those who foresaw no change, a number of comments expressed the idea of uncertainty about the future:

“we just don't know what will happen” – Provider

“It is very unpredictable” – Provider

“Don't know how things are going to go at the moment” – Provider

“It's all a bit like walking through fog!” – Provider

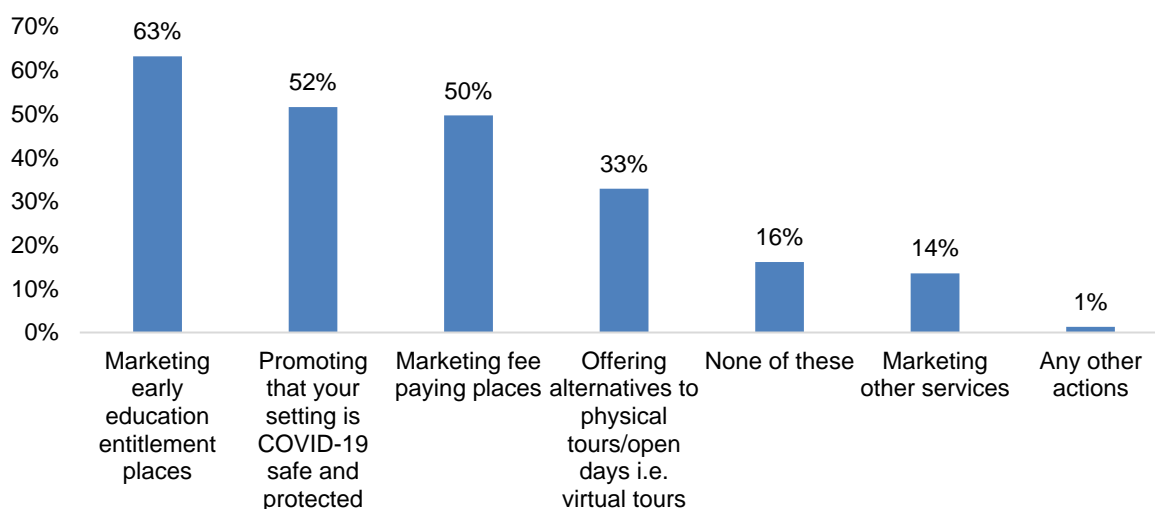
A few had firmer reasons for their answer ‘no change’, such as: “I am keeping the children I already have in January”; “not experiencing any change. I am always full”.

We asked respondents to quantify their expected level of occupancy from January 2022, a question they found easier to answer, as only 7% replied ‘don't know’. The largest number (41%) expected at least 80% occupancy; 65% expected at least 60% occupancy, and 90% at least 40%, with 3% expecting only up to 40% occupancy this year. These last four respondents were private nurseries (n=3) and a maintained nursery class in a primary school (n=1).

Expected operational and/or staffing changes in 2022

In our survey we asked about a number of actions providers might be undertaking to promote themselves (Figure 40). Most often, respondents reported marketing the early education entitlement places (63%), with over half also promoting that their setting was Covid-19 safe and protected. Respondents could select more than one answer. Only 16% were not undertaking any marketing or promotional activities.

Figure 40. Marketing and promotional activities undertaken by providers



(n=155)

Other actions mentioned in comments included face-to-face open days, a banner on the gates, newsletters, twitter and website, leaflets to local playgrounds, and advertising in local shops.

Staff recruitment was mentioned as a big issue by most of the providers we spoke to who employ early years staff. Many early years practitioners left the profession during the

height of the pandemic and new staff were either not being qualified or coming into the sector – a sector that was frequently described as high risk, low status and poorly paid.

One provider mentioned how she had spent thousands of pounds on a recruitment campaign, but how only three candidates had turned up for an open day out of the 21 people who had registered, and after a lot of effort and cost they had only been able to recruit one new member of staff. Another provider mentioned that earlier in the pandemic it had been mainly unqualified candidates that applied, while now they were not receiving any applications.

Interestingly, the school nursery manager we spoke to did not mention similar recruitment difficulties, mostly likely because school nurseries generally employ qualified teachers rather than early year practitioners.

As in other keyworker professions, childcare staff are also showing signs of burnout and feeling less resilient. This was described as an outcome of having to work through the pandemic in a challenging and constantly changing working environment:

“The pandemic has been a challenge for two years, managing extra cleaning, isolating, sending home children who were ill, all the extra work and the pressure that is put on staff, they have lost their resilience. Now they can’t shrug things off. I am not saying people are being light-weights or they’re being lazy, it’s just that they have lost all their resilience that they used to have... normally people can manage and cope as they have that resilience. But I think everyone’s got emotionally dragged down by it...”

– Nursery manager

Support needs

Parents’ support needs

Parents and carers suggested ways that parents could access information more easily. One proposal was to improve connections between schools and childcare settings so that schools could provide more information. Another proposal was a forum for parents to share their experiences of childcare. Some parents suggested Birmingham City Council should host a list of childcare providers, allowing users to filter by area or post code. The council was seen as a more credible host for childcare providers than www.childcare.co.uk. Trust was an important factor for parents when deciding about childcare. Another parent suggested improving the council website by making the information more succinct, all in one place and in plain English.

Other parents recommended a database with information about childcare in the local area. One parent stated that it should include clear information about EEE, such as whether it is accepted and how it can be used. Parents we interviewed suggested ways the council could better inform families about EEE, such as by sending letters, making phone calls, posting leaflets, advertising on social media, using posters on public transport, and communicating through school newsletters or healthcare professionals. There was a letter sent to parents about EEE in a neighbouring borough – a possible model to follow. One parent mentioned that contacting families about EEE was particularly important in deprived areas.

Parents we interviewed also suggested ways to help parents find childcare to meet their needs, including availability at late hours and multilingual staff. One parent advocated a more consistent system and that standards be improved. She highlighted that there are many childminders rated poorly where nothing is being done, but they remain in operation. She explained that she would rather stay with her children as she doesn't trust some settings, but that she has to work for her career.

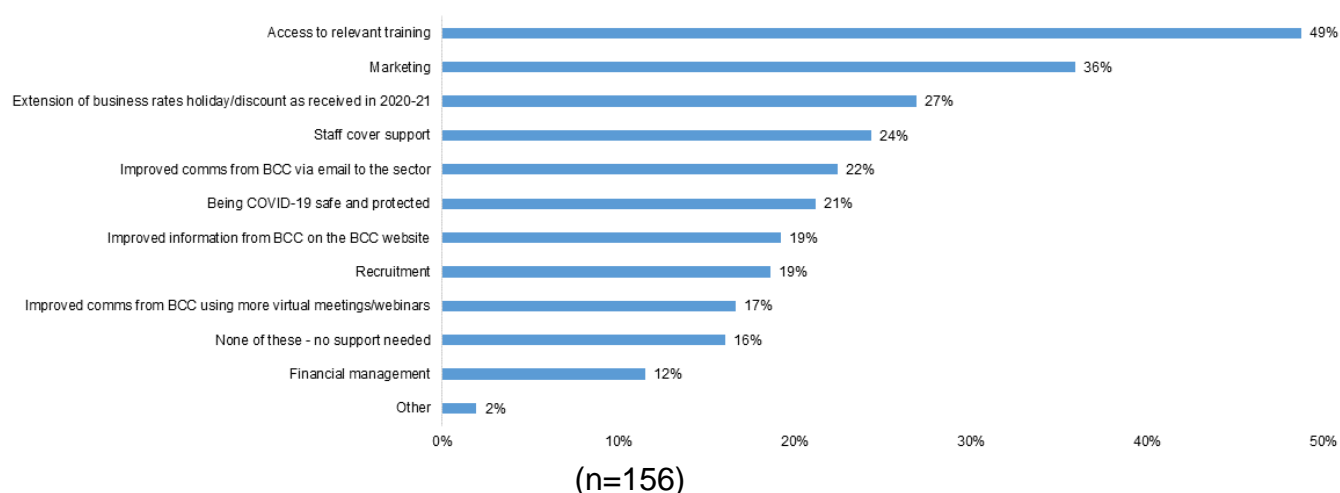
“I think that all nurseries should definitely be the same in the sense that right now some nurseries run the scheme where they have 30 hours, which is brilliant, but then some nurseries don't, so you have to make that choice – do you want your child to go to an average nursery, get the 30 hours or do you want them to go to a brilliant nursery and only do 15 hours? I think if all nurseries had that system, they were open for 30 hours, I think that would be brilliant, to help those parents who don't have the extra support.” – Parent

Some parents made suggestions relating to affordability. Parents recommended cheaper prices, universal free childcare and more support from the government.

Providers' support needs

Our provider survey asked what additional support, other than funding, providers would currently like to have. There was interest in a range of types of support, with only 16% seeing no need for any types (Figure 41). The highest level of interest was in access to relevant training (49%), marketing support (36%) and an extension of the business rates holiday received in 2020-21. In terms of Birmingham City Council communications, there was more call for email communications (22%) than in improved information on the website (19%) or in webinars or virtual meetings (17%). Other types of support called for in written comments included additional SEND support, advance notice from the council in respect of funding, financial support with the costs of Covid-19 such as extra PPE and cleaning materials, free or low cost training such as on the Designated Safeguarding Lead role, and First Aid training, and a website for the exchange of nursery equipment.

Figure 41. Support other than additional funding providers would like to have



We asked respondents what sort of improvements in communications they would like to see, and 30 wrote comments. Some comments related to the form of communications, and others to content. Comments on the content of communications included:

“Support on EYFS information for example more Birth to 5 guidance” – Provider

“Benefits of childcare to the child’s development” – Provider

“Financial help” – Provider

“More free training” – Provider

Comments on the form of communications included suggestions to make funding or grants easier to see and apply for; clearer outlines of rules and fewer repeat emails; more prompt information; more update meetings; virtual meetings and webinars; face-to-face training, and “to speak to someone”. One person commented on the amount of communication as being too high, and another on it being not enough:

“Reduced and selective communication please as at the moment it is too much and in addition to DfE updates can end up being overlooked and sent to spam” – Provider

“Some communication. Since March 2020 we have had almost no communication from LA” – Provider

Providers currently access support and information from a variety of different sources. Childcare settings that are part of a bigger entity, like a private nursery chain, academy trust or voluntary organisation, highlighted how they access head-office support, such as HR, marketing, customer service and in-house support.

During the pandemic, providers received regular guidance and information about changes to rules and regulations from different sources, including Birmingham City Council, Department for Education and Ofsted. Such information was described as useful, and providers generally felt well-informed, although a few would have liked more specifically targeted information, for example for childminders only.

Birmingham City Council’s Early Years Inclusion Support service (EYIS) was also an avenue of support, and within this, the Area SENCo team especially was described as a great source of information and support by many of the providers we spoke to. However, while the work of the team was recognised as helpful, some providers believed that more resources were needed for the team to be able to cope with the growing number of SEND children being identified post-pandemic:

“The Area SENCo’s work really hard and I know they could probably do with support themselves, but I am guessing there is not the funding for their team to grow” – Nursery manager)

In addition, many childcare providers had built up informal networks and partnerships, for example with organisations and services that they shared facilities with or co-located with. Such contacts were often their go-to when parents needed support for their children with additional needs.

Support needed by providers

Providers highlighted a range of support that they would like to receive. Overall, their main focus was on earlier and better support, and more funding, for children with additional needs. This was an area where most providers we interviewed wanted more support,

especially as they were seeing a growing number of children with special needs coming into their setting now compared to prior to the pandemic.

Providers also specifically mentioned:

- Better and quicker access to speech and language therapists and occupational therapist

While some work is already being done by Birmingham City Council to support childcare settings identify children's speech and language difficulties, through the WellComm programme⁷, providers saw a real need for more speech and language therapists and also for occupational therapists, coming to their setting to work directly with children.

"If I was a local authority person with an endless budget, I would focus on language, and personal, social and emotional development. Particularly because, in terms of Ofsted inspections, those are two of the prime areas that they look at as well. So there could be a knock-on effect in Ofsted inspections as well." – Private nursery manager

- More in-setting visits

The pandemic had seen most local authority services transfer support to email, phone calls or video support, instead of face-to-face. However, providers valued on-site visits, and would especially like the Area SENCo team to start being more 'hands on', make more in-setting assessments, and develop relationships with parents directly. As one provider highlighted, "parents don't want to reach out to a computer".

- Better recognition of staff in the childcare sector

Unlike other keyworker sectors, like the NHS, some of the providers we spoke felt that the childcare sector was not given the recognition for the important work providers had done throughout the pandemic. The 'high risk, low status and poor pay' reputation was now having a detrimental impact on staff retention and recruitment, at a time when more children with additional needs were accessing childcare settings.

- Less paperwork and quicker access to funding for SEND children

While funding was available for SEND children, a few providers mentioned that this tended to be too little and to be paid too late to benefit the child in their setting. One provider, mentioned a child who needed one-to-one support, but the funding only covered one-to-four group support, and to deal with this shortcoming in funding the child was only accessing one hour a day instead of three hours. Other providers mentioned the need for funding to be more responsive and quicker payments. Understandably, providers were hesitant to recruit and pay for additional support before the funding was in their bank account. One nursery manager we spoke to, provided a number of examples of children

⁷ <https://www.gl-assessment.co.uk/assessments/products/wellcomm/>

who had left their setting before the funding was paid into their account, concluding: *“What difference has that made to that child?”*

- Access to more and cheaper training

Childcare providers in larger settings that were part of a nursery chain or academy trust generally accessed training externally, and were less likely to mention training as an area of support needed. However, smaller setting, and especially childminders, mentioned how they would like to access more and cheaper training through the local authority.

Conclusions and priority actions

Covid-19 has brought challenges to parents, carers, providers, employers, and everyone in the childcare sector. The implications for the sufficiency, affordability, and quality of childcare in Birmingham are not straightforward. This year for the first time we surveyed and interviewed parents and carers, providers, and employers to better understand their experiences during this unprecedented time. Parents and carers faced challenges trying to find childcare during the Covid-19 lockdowns. Providers were especially concerned about vacancies and being unable to replace the children that had not enrolled as anticipated during the pandemic. These providers were divided on how they anticipated the implications working out for them in future, with some uncertainty over what would happen next. Many of those we heard from were concerned about the impact of the pandemic on children, with providers seeing more children with additional needs and delays in the development of their social and communication skills. Childcare will play a key role in recovery.

Childcare is an essential local service and difficulties in finding suitable childcare took an emotional toll on some parents. Most parents and carers used multiple providers to meet their childcare needs, with some experiencing particular difficulties in finding places open outside of traditional hours and wraparound care. Our interviewees, including private providers, described childcare as a needed service for the community. But, with inflation running high relative to the recent past, and Birmingham’s lower than average family incomes, affordability is a barrier for parents and carers, for some a major barrier. As such, it is a problem for providers too. Just over half of parents and carers would prefer to use more childcare than they currently are; the main reason for not doing so was cost. It is also a barrier for employers, where childcare costs limit parents’ ability to work.

The small number of parents we interviewed about their non take-up of EEE identified a broad range of reasons. . These included a lack of awareness, difficulties finding places, additional charges, concerns about child readiness and SEND, perceived advantages of not using formal childcare, and confusion about the process or criteria. This suggests professionals need to adopt an open mind, avoiding assumptions about why parents are not taking up EEE, and be flexible to help parents and carers overcome the range of barriers. Parents and professionals recommended a number of different approaches to encourage EEE take up. Some recommendations relate to introducing practices in childcare settings and Children’s Centres, which the council might be able to support, and other recommendations could be implemented more directly – such as reaching out to those who are excluded digitally and providing practical help with completing forms.

Amid the challenges are the positives, which shine through this report. Quality is the most important factor to parents and carers when deciding on childcare. Parents and carers

were generally happy with the childcare they were using currently, and spoke about benefits for their children, especially those who had children with SEND. According to Ofsted, the quality of providers in Birmingham is high (93% good or outstanding) but slightly below the national average. We heard directly from children, who had positive opinions of the childcare they received. Most working parents reported that their employers were flexible and supportive when it came to childcare issues.

These overall messages are complicated by the highly local nature of childcare, which varies widely between districts and wards. We identified considerable variations by area in terms the numbers of providers offering EEE, numbers of vacancies, providers opening outside of traditional hours, and the proportion of children attending childcare outside of the area in which they live. This report concludes that, overall, the supply and sufficiency of childcare in Birmingham are strong. But some parents and providers, including particular groups, experience specific and local challenges.

SEND families

Our findings suggest that settings need support and training to help them understand SEND needs. More work is needed to explore whether children with SEND are under-represented in children accessing EEE (6% of children accessing the 3-4 year old offer have SEND compared to 15% in state-funded nurseries). Parents wait lengthy periods for diagnosis, so this may be due to children's needs becoming evident and being diagnosed over time, or may suggest a need for support to settings to deliver early support for SEND. The pandemic has led to a concern about all children's progress in learning, and children with SEN have greater difficulty with learning than the majority of children their age. Extra support for SEND may be under pressure if funding remains constant as we emerge from the pandemic while need has grown.

From the perspective of parents of children with SEND, levels of satisfaction with childcare overall, and perceptions of the suitability of childcare were positive and in line with other parents. However, these families were more likely than other parents to want to use more childcare; to use informal childcare; and to experience difficulties in finding childcare. They were also less likely to be aware of EEE entitlements. This points to the need for targeted information, advice, and support in accessing provision for this group of parents.

Ethnically diverse families

The local authority have decided to use the term 'Ethnically Diverse' in this report where appropriate rather than 'BAME' as this is an increasingly contested term.

Given that most children in Birmingham are ethnically diverse, the majority of childcare in the city is delivered to children from diverse backgrounds. Levels of satisfaction with childcare overall, and perceptions of the suitability of childcare were positive for parents from an ethnically diverse background, in line with White parents. However, these parents were slightly more likely to experience difficulties in finding childcare, and wanted to use more childcare than they currently were. These parents were also less likely to use informal childcare compared to White parents in Birmingham. Additionally, parents and professionals informed us that it was more difficult for parents with English as an additional language to find out about childcare and EEE or know how to approach it. This, again, suggests the need for targeted childcare information for this group.

Recommended actions

Our findings point to the following priority areas for future work, some of which are easier to address than others. This report supports the council's continued focus on the priority actions from 2019, in particular:

- helping childcare settings with the highest vacancy rates; and
- improving take-up of the free offers by eligible children.

Based on our findings, future work by Birmingham City Council should also focus on:

- staff vacancies;
- monitoring any potential further reduction in holiday childcare sufficiency;
- addressing some parents' view that childcare is not affordable, for example through promoting EEE entitlements;
- targeting promotion of formal childcare to groups we find make most use of informal childcare: white families and families of children with SEND;
- targeting information, advice, and support about childcare to ethnically diverse and SEND families;
- helping providers (such as those in wards with high levels of EEE take-up) to share good practice with others;
- promoting EEE entitlements and other Government support through the tax and benefit system;
- supporting providers to improve quality, directed at lower rated settings; and
- promoting and helping to develop staff training offers.